Developing a Successful Onboarding for a B2B Software-as-a-Service Company. Case: Company X

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Abstract

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Organizations are nowadays chasing the digital transformation trend when they put data on the cloud to get rid of traditional work. With the rise of Salesforce, a Customer Relationship Management platform, software vendors have grown rapidly to develop solutions to elevate Salesforce usage. The commissioning company also partners with Salesforce to sell its product. The most recent breakthrough in the Software-as-a-Service (SaaS) industry is a shift to recurring business. This has resulted in changes in customer position in obtaining and bargaining. A new term called “Customer Success” was developed in order to ensure the customer’s successful outcome in adopting a product, service or solution. The pre-purchasing onboarding phase is concentrated in this research.

The thesis objective is to develop a successful customer onboarding process for the commissioning company. The study includes both theory and research sections. Theories that are related to customer success, customer journey and customer onboarding are discussed to understand how important those processes are to a software vendor. The research part consisted of two phases, are qualitative interviews and benchmarking. While interviews were conducted to gather the current onboarding process of company X, benchmarking was used to learn different approaches that have been successfully adopted by competitors and to create development suggestions.

This thesis proposes recommendations considering other approaches to improve company X’s own onboarding. The development suggestions include creating more graphic contents, utilising engagement email and establishing an online review system to gain insights in user experience. Apart from that, this thesis may assist any software vendor in developing its onboarding methods to land more prospects, enhance user experience, and especially retain current customers.

Keywords
User Onboarding, Customer Success, B2B, SaaS, Benchmarking, Salesforce

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1 Introduction

The purpose of this chapter is to introduce the general ideas of the thesis. The background information, commissioning company, the research question and demarcation of the thesis are covered. This chapter also demonstrates the international aspects and benefits of the thesis to the stakeholders involved.

1.1 Background

Software as a Service (SaaS) evolves with the rise of the Internet. It is a business model where the application vendors manage and develop their own software and licensing for other businesses and consumers to use. The industry is on the rise and is predicted to worth 130$ billion by 2020 (SaaSMag 2019). At the same time, organizations are chasing the digital transformation trend when they put data on the cloud to get rid of the traditional work. With the rise of cloud computing, a leading Customer Relationship Management platform, Salesforce, that allows companies to manage a shared view of their customers, also advances nowadays for all types of organizations. Go hand in hand with the upsurge of Salesforce, integration applications are also growing to elevate Salesforce usages. Salesforce is a Customer Relationship Management Platform that can be incorporated with multiple other enterprise applications that concentrate on customer service (TheStreet 2018). It is named a leader in SaaS Marketplace by Independent Research Firm in 2018 with the highest score in eight of the ten criteria. These include user interface, application availabilities, intelligence and automation (Salesforce 2018).

Meanwhile, SaaS businesses have a recent breakthrough when they shift their business model to offer their products and services base on subscription payment rather than a one-time purchase. This means companies with this subscription business model, need to concentrate on customer retention rather than customer acquisition. The bottom line is companies that adopt the recurring revenue stream with subscription model, establish a tighter customer relationship in order to keep them stay.

Companies that offer the subscription plan should bear in mind that once the customers sign-up for their services or products, they will continually decide whether it is worth the recurring cost (Digital River). With subscription plans, consumers will have more convenience of cancelling or switching. For brands, the benefit comes from customer retention where customers keep staying with the company products or services. Therefore, brands with the subscription payment model should concentrate more on their customers by developing customer relationship management, improving customer lifecycle by attracting new users and making them stay after every purchase. In order to capture new user attention, software companies have been providing trial periods for potential users to test out their product features and then requiring payment after the trial period ends.

Not until recently, the term Customer Success has been provoked to show a business methodology where the customers can achieve their maximize outcome when using a product or service with the support of companies (Gainsight). Go hand-in-hand with the subscription business model, customer success matters because it boosts customer happiness and retention to increase revenue and customer loyalty (Hubspot 2019). One of the core stages of Customer Success is Onboarding. Customer onboarding is critical because it is the first engagement between the company and customers. The company role here is to provide the customers the help they need to obtain the value of the product (Adams, 97). Therefore, to understand the demanding of customer onboarding in SaaS industry and how can it be applied to the case company, the thesis will explore the current position and learn from three major players.

1.2 Research question

The research objective of this thesis aims to further improve the case company onboarding process by figuring out the current problem and benchmarking with other competitors. After a qualitative interview, the author will compare and do comparative analysis with other top players in the same industry. Afterwards, development suggestions for the case company will be introduced to develop the process. To successfully conduct the research, a research question (RQ) has been formed to cover the thesis objective:

What can be done to develop the company's customer onboarding process compared to competitors?

The RQ is broken down into investigative questions (IQ) as followed, represents each probe of the thesis:

IQ 1: What are the current strengths and weaknesses of the customer onboarding process?
IQ 2: What are the selected competitors' customer onboarding processes like?
IQ 3: What are the differences between the case company's and competitors' customer onboarding processes and how can these differences be utilized to improve the case company's customer onboarding?
IQ 4: What development suggestions can be made to improve the case company's customer onboarding process?

Table 1 below presents the theoretical framework, research methods and results chapters for each investigative question.

Table 1. Overlay matrix

Investigative question	**Theoretical Framework***	**Research Methods**	**Results (chapter)**
IQ 1. What are the current strengths and weaknesses of the customer onboarding process?	Qualitative Research Method. Company representative interviews Customer interviews	How does the company providing new users knowledge to use the product? Any documentation, training? What are the most frequently asked questions?	Chapter 4.1
IQ 2. What are the selected competitors' customer onboarding processes like?	Internet research with three competitors	Who are the competitors? What are they having with onboarding process?	Chapter 4.2
IQ 3. What are the differences between the case company's and competitors' customer onboarding processes and how can these differences be utilized to improve the case company's customer onboarding?	Competitor Benchmarking. Develop a framework with at least three criteria for comparison	Is the product hard or easy to use? Does it involve a third-party consultation, or the customers can do it by themselves?	Chapter 4.3
IQ 4. What development suggestions can be made to improve the case company's customer onboarding process?	Based on the findings and given theory to develop suggestions	What is leaned from the competitor that can apply to the product?	Chapter 4 + 5

1.3 Demarcation

The purpose of defining a demarcation is that the author cannot go far beyond the scope of the thesis topic. What have been introducing briefly above over and over such as customer relationship management, customer lifecycle, customer success and customer-centric, these are all important terms that will be mentioned again in key concepts and the theoretical framework chapter without going further the definitions of it. The focus of this thesis is a step of customer success inside customer lifecycle, which is customer onboarding. There is also “employee onboarding” concept but it is not related to this research.

In this research, onboarding and customer success terms have been introduced. They will be the focus of the thesis on how to improve these processes. Customer onboarding is defined as a step inside customer success where the purchase is made. However, for this case company, the onboarding process happens even before the purchase is made. It is when the users download the trial version and ask for support or require a Proof of Concept to find the best fit for their business. After the deal is closed, the users or buyers become clients or accounts, then the onboarding process continues. For this research, the objective will concentrate on the stage before the conversion happens, because of the commitment of product licenses and lack of resources.

In addition, this thesis will contain benchmarking research method. This strategy in B2B can become unethical if the data is listed privately. If the data is achieved by persuading competitors' employees or paying for information, the ethics of this act should be considered. However, data is listed publicly on the Internet with ease of acquiring so the author will always stay on the ethical side.

1.4 International aspect

This research has its international aspect because the commissioning company provides its software internationally which is not limited to any country. All the customers are Salesforce clients and are from around the world. Although the commissioning company product only provides for Salesforce users, the thesis content and outcomes can also be beneficial for any software vendors even outside of Salesforce. Any SaaS organizations that provide the same subscription business model with a customer-driven strategy can refer to this thesis for recommendations on their customer relationship management system.

1.5 Benefits

The company and the author can both benefit from this research. The thesis will conduct thorough research on customer success advantages for digitalized SaaS business. Currently, there is only one person who is in charge of communications with the customers which is overloading for this individual. Only answering the requests from customers already takes most of the time, so this person does not have time to develop a concrete plan to onboard new users. Moreover, from the sales side, usually, the sales funnel takes very long to convert trial users to active customers that make the learning process even longer. Also, from the product side itself, it has some learning curves that new users will find it hard to learn only within thirty days. To conclude, an onboarding plan will be a good tool for the company to attract and convert more customers which will take away the responsibility of a technical support person so that he/she can deliver a successful and satisfying customer plan.

For the author herself, this research will provide in-depth learning into the competitors as well as solving the case to develop a solution for the company which will help boost her skills in analysing and benefit her future career. Additionally, this is a valuable opportunity for the author to develop skills required such as project management skills, communications and knowledge in customer-driven B2B strategy.

1.6 Risks

The obstacles that the author might have while implementing this research is the limitation of the respondents for qualitative interview and ethics in conducting internet research of competitors.

The thesis will focus on developing the onboarding process before the purchase happens. To get a descriptive and reliable result, the diversity of respondents here should not only target the company representatives but also the users who have approached and downloaded the software for own use. The obstacle also lies in the uncertainty and unwillingness to participate in the interview. However, the respondents can be the company's representatives as they have been communicating with customers and know what the problems usually are and can help with asking the questions on the author's behalf. In addition, usually, the adoption stage of a product is lengthy that the author herself needs to align her timeline with the prospects'.

B2B benchmarking strategy will stay on the ethical side as long as the information is publicly provided on the internet. All accessible data and documents will be utilized as much as possible for comparison without doing any unethical actions such as asking for organization privacy or acquiring information illegally.

1.7 Key concepts and abbreviations

In this sub-chapter, main concepts will be briefly illustrated and mentioned for easier recognition later. The author will use the word “product”, “service” and “solution” interchangeably as they will all indicate one meaning is the case company software.

A Free trial is a product or a service that is offered to customers for a short period of time for free so they can experience it. (Cambridge Dictionary)

A **Solution** is a package that combines products and services, which is purchased as once to solve a business challenge. (Adams 2020, 8)

AppExchange is a cloud marketplace that offers Salesforce applications, components and consulting services. This is where the Salesforce administrators or users explore tools and integrated apps to assist in a company's productivity. (Salesforce developers)

B2B is abbreviated for Business-to-Business which is a form of transaction between businesses. (Investopedia 2019)

Benchmarking is a research method to identify, understand and adapt from good practices of competitors to develop one organization's performance. (Niva & Tuominen 2011, 5)

Conversion is a transition from one state to another (Rabhan 2013, 6). In this thesis, **conversion** refers to **sales conversion** which describes the transformation of when a user or an organization becomes a customer or an account by purchasing a service or a product.

Customer lifetime value (CLV) is a metric that calculates total revenue a business can achieve from an account base on the customer's revenue value over the period of their business relationship. (Hubspot)

Customer Relationship Management (CRM) is a practice that an organization implements to manage and interact with its customers. (Investopedia 2019)

Customer Success (CS) is the process of "helping customers to maximize the value they attain from the product". (Adams 2020, 1)

Marketing automation refers to a technology that manages marketing processes and campaigns by combining customer database with rules to automatically populate relevant, timely contextual emails, social media updates, and personalized website advertisements. (Chaffey 2017)

Onboarding is a process of Customer Success in which the company assists the customers to obtain the significant value of the product, service or solution as quickly as possible by providing them initial stages such as training and support (Adams 1967, 98).

Prospect is a person or business that potentially becomes a customer or a client in the future. (Cambridge Dictionary)

SaaS stands for Software-as-a-Service is a browser-based application delivered as a service to the consumers. (Kavis 2014, 17)

Salesforce is one integrated customer relationship management platform that gives all departments a shared view of every customer. (Salesforce 2019)

Salesforce Org (Salesforce Organization) represents a customer version of Salesforce with its data. Each org acts individually and can be customized by installing different applications, adding data and coding. (FocusonForce)

Subscription business model is a strategy to sell a product or service in which the payment made based on a period, usually weekly, monthly or yearly, to use a service or a product. (Investopedia 2018)

User experience (UX) “encompasses all aspects of end-user interaction with a company, its services and its products.” (Don Norman, Cognitive Scientist & User Experience Architect)

User interface (UI) “is interface features through which users interact with the hardware and software of computers and other electronic devices”. (dictionary.com)

Workflow can be put as a structured set of activities to produce a desirable result. It can range from basic like consecutive steps to a complicated series of events that must follow predefined rules or conditional requirements. (Smartsheet)

1.8 Case company

Company X is an SME company based in Finland. It is an Independent Software Vendor (ISV), founded in 1997. The company has different software products and all of them are related to providing solutions for businesses to conveniently enable working with documents. The product to be researched in this thesis offers document related solutions to businesses by quickly generating documents base on ready-made templates and automation workflows. As for the learning curve of the product itself, customers usually find it hard to deploy, especially when it involves coding and other computer languages.

As mentioned above in SaaS industry when businesses shift their focus from a one-time payment to subscription, the commission company has already adopted this method since the product was developed. Since then, the urgency in improving customer service is undeniable as customers can easily switch their service provider, especially for Business-to-customer companies.

The trial period of this software lasts for thirty days which is a very short amount of time to learn how to use new software. Therefore, to encourage trial users to pick up the trial, the company has already established documentation online in the self-served centre. However, after thirty-day trial, the conversions rate is rather low as users usually do not respond to email enquiries or offers by the company.

The company develops a case why the users end up using competitors' products rather than its. The requirements are to investigate the user experience, the process before purchase decision and to compare among the top players in the same industry. Since the licensing contract asks clients to commit at least a year (annual recurring) for every purchase and the fact that it is difficult in learning the product itself, it is irrational to switch the software suppliers.

2 The significance of onboarding in customer success

The second chapter will focus on explaining the theories covered in this thesis. The concept of User Onboarding and Customer Success in SaaS business are introduced and elevated to fit with the company business model. The author also brings up the Onboarding process in relation to Customer Lifecycle and mentions the importance of this phase in Customer Success. Since the purpose of this thesis is to benchmark and develop, a set of criteria would be listed for comparison. This chapter will also include the approaches in that set.

2.1 Customer success in SaaS

In this subchapter, the concepts of Software-as-a-Service (SaaS) and Customer Success will be illustrated in detail to help the readers understand the software industry in general and how customers are important to the existence of a company.

2.1.1 SaaS

SaaS is no longer a strange term to people nowadays when it comes to business and innovation. The term, which was first introduced in 1995, has revolutionized the software industry (Murphy, Mehta & Steinman 2016). SaaS indicates a complete application that is delivered as a service to the consumer. These service consumers only need to configure some parameters so it can fit with the organizations and manage their users. Meanwhile, the service providers conducted all the architecting infrastructure, application logic, deployments and everything to deliver a complete product or service (Kavis, 17).

Some common examples of SaaS applications are Customer Relationship Management (CRM) like Salesforce or HubSpot, Enterprise Resource Planning (ERP) like SAP and Oracle, and some others that support the consumers organizing cloud data more logically, like payroll, accounting, human resources, etc. Companies choose to rely on or outsource to these applications as they do not have to hire staff or inhouse to maintain or manage those. By that, they have to pay a recurring fee or so-called subscription fee to use this browser-based service. (Kavis, 17)

The interest in subscription business model has grown enormously for the past decade and is not only in Information Technology but also in every technology-related industry. For the subscribers, the sharing economy makes it simple to access anything with the Internet rather than input some human assets. With software vendors, the recurring revenue streams keep the customers spending for years (Lah & Wood 2016, 1). This means that the power in these transactions has switched from providers to customers. The complexity and costs of changing B2B software solutions were hardly achievable before when customers had to buy the software, hardware and hired inhouse to install and maintain. Nowadays with abilities to license without worrying about software architecture or maintenance, customers become more powerful. (Murphy et el 2016)

Meanwhile, the cost to acquire new customers is rather steep comparing to the amount of retaining current ones. This cost includes marketing expenses on approaching leads, sales cycle in order to convert those leads into prospects and onboarding phase getting converted prospects into successful customers. The process can charge up to twenty-four months and continue. Software vendors soon find out the value and efficiency of maintaining purchased customers. They train their customer to become product-usage certified, resolve present issues and form strategy to improve customer's health based on data and contextual inputs (Gainsight). This makes the impulse in the emergence of customer success

2.1.2 Customer success

After discussing the transformation of the SaaS industry into a more customer-centric and subscription business model, this subchapter continues to deliberate the concept of customer success. The term itself has become one of the biggest buzzwords in B2B (Gainsight).

Customer success focuses on providing customers the assistance they need to achieve their goals towards the purchased solutions (Adams 2020). It concentrates on relationships in client management, that aligns customer and company goals for mutual benefits (Gainsight). The intention of this is to maximize retention and customer lifetime value (Murphy et el 2016).

When does customer success happen to a company? It occurs when the clients realize a satisfactory level of return of investment in the vendor's products, services and solutions (Adams 2020). The way "success" means itself a positive result of something (Cambridge). Customer success is designed to achieve loyalty from customers. Loyal customers are significant to recurring revenue businesses as they will maintain the revenue stream every year with less cost compare to acquiring new clients (Murphy et el 2016).

An interesting insight from Gainsight has differentiated among Customer success, customer support and account management. Gainsight is one of the pioneers in Customer Success software. According to one of its guides about customer success, these positions all require communications with customers and resolve their issues but why not combine them into one position? Yes, the tasks require them to interact with customers to solve their problems with the product or service. However, the problems here are different, either are technical or commercial, which demand different skills and knowledge. The table below will demonstrate the differences between the three positions in order to provide a thorough understanding of “Customer Success”.

Table 2 Customer Success vs. Customer Service vs. Account Management (Gainsight)

	Customer Success	**Customer Service**	**Account Management**
Characteristic	Proactive	Reactive	Reactive
General tasks	-Understand customer experience and lifecycle to form strategy for improvement -Concentrate on the success of that account and the company in general	Provide customer the help they need when they have technical problems	-Resolve customer commercial problems -Manage clients and commercial practices (i.e invoice, sales, offer, etc.)
Knowledge required	Basic technical knowledge in order to do training, form relationship and gather data from customer service and account management to improve	Advanced technical knowledge of the product in order to resolve quickly	Knowledge of the products or service, industry, competitor’s, law and advertising

In Practical Customer Success Management, chap 3, Rick Adams has introduced a framework where he listed phases of customer success management. The framework states all the activities which are related to customer engagement and should be carried out orderly. He also mentioned this framework is depicted as a wheel rather than a linear progression to illustrate the concept of cyclical work. (Adams 2020, 36-37)

Figure 1 The Practical Customer Success Management Framework (PCSMF)

The PCSMF contains seven phases, typically starts with an activity relating to exploration and validation of information (Preparation) and ends with evaluating and reporting on results (Engagement Evaluation). The concept of the wheel as progression expresses the flexibility in CS approach where it is possible to revisit or skip forward a phase when necessary, meanwhile, "…at all-time maintaining an overall progression forwards in order to ensure the engagement's desired outcomes are attained". (Adams 2020)

Describing quickly through the phases inside the PCSMF, the first phase is Preparation. Like any other starting point, preparation contains tasks such as gathering basic information to engage with customers, kickstarting the project and ensuring the customer hit the ground running with what the company offers. Next is Commitment. In this step, CS tasks are to ensure customers share a mutual understanding of what the next essential steps are, validate all the assumptions might have during the Preparation phase and develop a trustful relationship with key stakeholders. After getting to know between two parties, onboarding phase begins to reduce customers' frustration of lacking information after buying the service, product or solutions. The idea of this phase is to get customers to attain measurable value as quickly as possible. Continue with the progress is the Adoption Planning phase. This stage is when to research and analyse customer information to acknowledge who are the users and how they are going to adapt their purchase. Right after Planning is Adoption Implementation which is to execute the plan. The progress carries on with Value Realization when the adoption has completed. The value created while using the product or services needs to be measured and tracked, while modification might need to be applied occasionally ensuring a surpassing outcome. Measurement and tracking come with evaluation and record. In the next step, Engagement Evaluation, any resources that have been created for customers can be re-used as instruction for future ones. In the PCSMF figure, the circle figure called Central Repository was put there represents a place to store the data of each phase. The purposes of this central place are that anyone can access the information at any stage and store newly created content.

To sum up why customer success has become relevant in SaaS industry as well as recurring business nowadays, it helps organizations becomes more customer-centric in order to drive success to customers and keep them stay. In addition, a new department has become an ideal or philosophy to ensure a constructive outcome in keeping the revenue streams every year. Concentrating on the details of CS progress and each phase provides a thorough knowledge of how customer engagement can become significant for a SaaS business. Hence, company X, which is a software vendor with recurring business, needs to escalate by engaging more with its customers.

2.2 User onboarding progress on customer lifecycle

After introducing Customer Success definition, its function and progress, the following will focus on where CS starts in the customer lifecycle, from general to details on the structure of onboarding phase in CS. Additionally, this subchapter also describes onboarding phase of company X: how they are doing differently and trying to transform their CS as much as possible.

2.2.1 Everything about customer lifecycle

Customer lifecycle begins once a brand catches a potential customer's attention. It is a process that customers should move through constantly. Establishing and maintaining customer lifecycle is essential for businesses to gain competitive advantages in today's marketplace (Tallyfy). According to Kalbach in Customer Journey Maps 2018, "customer lifecycles are broader than customer journey maps which deal with the lifetime relationship between a customer and an organization. It contains abstract phases that reflect an overall relationship rather than a specific journey". Also, he mentioned that customer lifecycle is about brand loyalty and emotional connection to an organization as a whole rather than just a product or service. In the figure below, Kalbach has illustrated the customer lifecycle with nine steps: Unaware, Aware, Consideration, Purchase, Support, Advocacy, Reconsideration, Departure, and Return.

Figure 2: Customer lifecycles look at the overall relationship to a brand (adapted from Kalbach 2018)

Why is customer lifecycle crucial here? It helps businesses develop a strategy for customer engagement (touchpoints) and understand customer behaviours in each phase. In modern CRM, businesses put the clients at the centre of everything they operate. With CRM platforms such as Salesforce or Hubspot, they allow organizations to gather and track leads, prospects, customers information like their preferences and history. Customer lifecycle is not a one-time process for businesses to establish and forget about. It is rather a continuous process that needs to tailor at every phase, hence, customer lifecycle management is a significant function of a business. (Salesforce, From Lead to Loyal: Creating Engagement through Effective Customer Lifecycle Management)

Amearesan stated in one of her blogs on Hubspot that “Customer lifecycle management is the process of assigning different stages of the customer lifecycle to different measurable metrics.” Customers follow a pattern of phases when they engage with a brand’s product or service. Before they come to purchase, rather than not making any touchpoints and hoping they will engage, organizations involved in the first step of the customer lifecycle, which is guiding those prospects toward their brands. By providing selling points and key values through marketing or advertising, organizations prove that they have been strategized their customer lifecycle management from when customers are just leads. (Hubspot)

Introducing customer lifecycle management illustrates that organizations need it to develop effective solutions to retain valuable customers by personalizing each phase of the cycle and strengthening relationships through communications. In general, to establish solutions in order to enhance customer experience, businesses have incorporated customer success into this process. Converting leads or prospects to paying customers and leveraging to loyal ones are the mutual objectives of a successful customer lifecycle management and customer success. The next chapter will explore how customer success integrates with customer lifecycle and investigate an important step of the Practical Customer Success Management Framework.

2.2.2 User onboarding as an important factor in conversion

After discussing customer success and customer lifecycle, this section moves on to reflect the onboarding stage of customer success, which has been incorporated into customer lifecycle as well as introduces company X's user onboarding phase. "User Onboarding is the process of increasing the likelihood that new users become successful when adopting your product" (Hulick 2011). In this company case, the objective is to explore onboarding stage and resolve the issue to convert more prospects to paying and staying customers.

"Getting a new idea adopted, even when it has obvious advantages, is difficult." (Rogers, 1). In Diffusion of Innovations, he defined that innovation can be an idea, a practice or object that is recognized by any unit of adoption, individual or an organization. Diffusion is the process the members of a social system communicate an innovation through channels over a lengthy period. Many innovations have taken a lot of time before they are widely adopted by society. Hence, a frequent problem for units of adoption is how to advance the rate of diffusion of an innovation. This theory applies to this research because prospects are exploring different options and spending time to investigate a product or a service before they can adopt one as an "innovation" for their companies. What valuable insights can be acquired with Diffusion of Innovation? The author finds that innovations have their own characteristics defining their successes. In order to help organizations adopting a newness for their change, developing a mutual understanding with the prospects through interpersonal communications and acknowledging their own product features are two factors in determining the success of an innovation. The onboarding stage is the process in which the software vendors will help with the innovation adoption.

Renz et el describe onboarding phase as a collection of methods and elements helping new users to become familiar with a digital product (browser-based, mobile or digital application). Those elements are registration, demo course, self-service resources, and email engagement. According to Rick, onboarding is a part of Customer Success in which companies assist customers to achieve significant values of the product, service or solution as quickly as possible by providing them initial stages such as training and support (Adams 1967, 98). This is an important step that determines the result of an ongoing relationship between the company and its customers. However, Samuel Hulick brings up another perspective that the user onboarding happens when potential users first encounter the service, which is recognizable by the case company. The below figure visualizes an ideal SaaS customer lifecycle (Hubspot), customer success incorporation in the stages and company X's onboarding process.

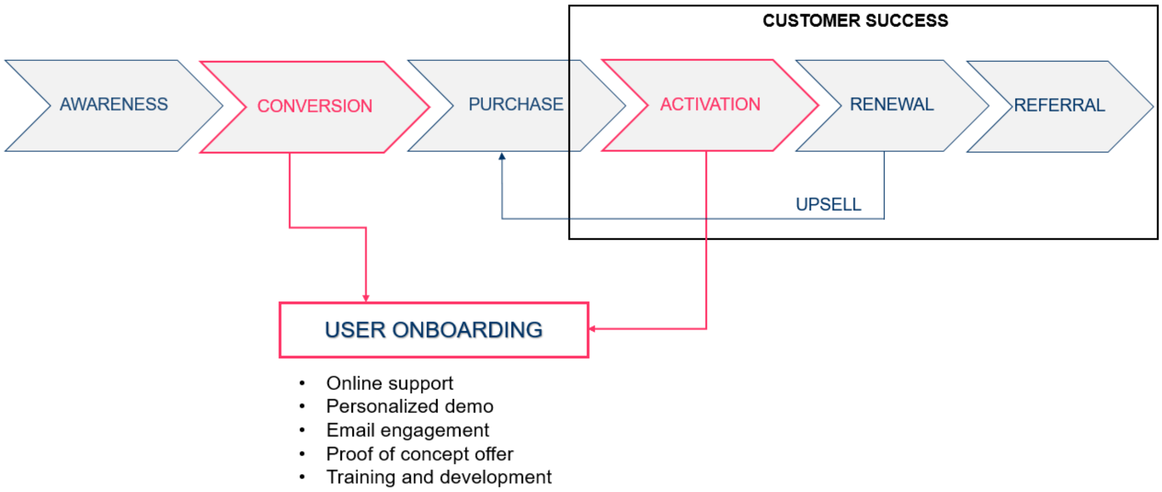

Figure 3: SaaS customer lifecycle with CS incorporation and user onboarding stage of company X

The SaaS customer lifecycle from Hubspot is portrayed slightly differently from the general customer lifecycle by Kalbach with six stages instead of nine. It is because of the recurring business model when the customer keeps renewing to subscribe to a product or a service. Those phases are Awareness, Conversion, Purchase, Activation, Renewal and Referral. Both the lifecycles have Awareness as the first stage. During this, customers realize organizations or brands which offer the solution that can resolve their issue by accessing free resources such as social media, blog posts and videos. The next phase is Conversion, where customers begin to learn more about the solutions by registering and testing a free version of the product. At this stage, it is recommended that businesses should start their onboarding stage by providing educational resources and nurturing these leads with relevant offers to convert them. The purchase stage is when prospects convert to paying customers. Providing training and supports is to help them understand and achieve the value of the product. After every purchase, the Activation stage reminds that customers can switch to other vendors anytime if they are unsatisfied with the product or service. Businesses should provide resources like customer support to prevent obstacles. Once the customers have successfully understood the value and use of the product, they will continue to renew the license to use. At this point, maintaining close communications and engaging with them to know if there are any possibilities to upsell or any objections of renewing might happen. The final stage is Referral. When customers are satisfied and keep renewing their subscriptions, they might become affiliates by writing reviews or recommending to others. (Hubspot)

As illustrated above, CS happens when customers purchase and become accounts or clients. Before the purchase stage, customers are still prospects, therefore, Customer

Onboarding is meant to happen after the purchase. However, with company X and probably most of the software vendors, onboarding stage starts earlier, even before the buying decision is made. The reason for this is that software vendors provide free trials to attract new users to test out products without any payment commitment. Later, the prospects (new users) can either choose to buy the solution or not. Thus, from the early stage of customer lifecycle, businesses should act on the onboarding by engaging and educating those prospects. Most of the software vendors usually have the same patterns of serving customers with free resources and engaging as much as possible to enhance their customer experience and at the same time to direct them to buy. Those patterns are also listed in the figure above as elements of User Onboarding:

- Online support: resolve user problems when they troubleshoot
- Personalized demo: engage with customers and offer a screen share to demo solutions based on their enquiries
- Email engagement: emails to be sent as welcome and provide useful resources to encourage and persuade customers to keep testing
- Proof of concept offer: an offer that contains a demonstration of the functionality and verification of a certain concept can be achieved in development
- Training and development: usually happen after customers have paid for the license. CS team will onboard customers by providing training session and constant support to assist them to achieve objectives of their purchase

All in all, before-purchase user onboarding is a crucial process for any software vendors to adopt. This will increase interactions between the prospects and the organizations to develop touchpoints for positive results such as a higher conversion rate. Given that software products are difficult to learn individually, four out of five listed elements of user onboarding should be considered when designing the onboarding process in specific or the journey map as a whole. The elements not only provide essential knowledge for new users to get used to adopting new software but also showing an organization culture that it cares for its customers. If they have already had a good experience during their pre-purchase, would they decide to buy? Probably as it is one of the factors driving the decision. The others are the nature of the product itself and the budget. In the next chapter, the author will illustrate how user onboarding is important in driving positive results in customer experience and conversion rates.

2.3 Initial onboarding affects customer experience and conversion

Additional to the user onboarding and its significance in customer success, the author will discuss in detail the elements that affect the conversion of purchase. User experience is one of the vital parts in driving the conversion rate. The word “initial” is used to differentiate the first half of the onboarding phase to the whole process, stated that this thesis only mentioned the pre-purchase onboarding stage. In this chapter, the author will present the user perspectives on adopting new technology for their organizations, in which trials and help from software vendors play significant parts in the improvement of customer experience and gaining positive outcomes.

In chapter 6 of Diffusion of Innovation, Rogers mentioned that there are different characteristics of innovations as main the factors in driving different rates of adoption. Adoption rate portrays the relative speed when an innovation is perceived by members of a social system. The characteristics help in shaping this rate are:

- Relative advantage: describes an innovation that its benefit supersedes the current tool at the client's premise. This would drive positive results to rate of adoption
- Compatibility: perceives a consistency, a fit with current situation of potential adopters such as the existing sociocultural values, beliefs, past experiences and contemporary needs. It would influence the positive result as well
- Complexity: the difficulty to understand and to use of an innovation which might affects negatively to the rate of adoption
- Trialability: portrays the ability to experiment the pre-purchase use on a limited basis which adding to positive result of the rate of adoption
- Observability: the results of an innovation are visible to adopters and stakeholder involved so it can lower their uncertainty which will affect the rate positively

These five attributes of innovations form valuable insights on how potential adopters accept new ideas. They count in resolving the quality of the diffusion process. In this research, "onboarding" process is such "diffusion of innovation" course in which diffusion scholars educate, analyse, and evaluate the new ideas that help adopters approve the innovation. These qualities can also be used in improving products or behaviours to drive affirmative results or higher conversion rates.

Besides evaluating and balancing innovation characteristics, potential adopter or prospect (from a business perspective) experience during the diffusion process is also important in determining a positive result. Therefore, the customer experience during the onboarding process must be considered. Understanding and providing the prospects of what they need with company's "innovation" would convey the impression of satisfactory customer service without over-promising anything. In this subchapter, the author will introduce customer experience in shaping a good brand and definition of conversion.

2.3.1 Customer experience

This subchapter describes briefly the customer experience even before the purchasing happens (when they are still prospects, not customers). The author wants to cover "Customer Experience" instead of stating "User Experience" because of their differences in meaning, coverage and the fact that it might cause confusion of using between these terms for readers. Customer experience is described to enclose also user experience (UX) that it is like an umbrella concept involves all channels, all products, services and how users perceive those (UXPin 2018).

Customer experience (CX) is portrayed as the total of interactions that users have toward an organization or a brand (Flaherty 2019). A positive customer experience builds brand loyalty and helps retain revenue, especially is beneficial for the current SaaS business model. According to Bordeaux, customers matter more than ever before as they have more power in switching brands. They are the best resources or recommendations to their circles in comparison with advertising and online reviews, and to grow brand awareness. A good CX reflects how well organizations design their strategies and most importantly the brands. Additionally, 86% of buyers are willing to pay more for a great CX. (Kulbyte 2020)

In chapter 2.2.1, the author mentioned that to enhance the customer experience, companies need to integrate customer success into customer lifecycle and build a customer journey map. All planned interactions or touchpoints between users and the company would give them the experience of a product or a service. Meanwhile, customer service is a small piece of the experience, many people think that if the service agents are responsive and effective then they are providing a great CX. Beyond that, CX is an end-to-end experience which means ranging from the first impression of the product through marketing to receiving customer support and lasting until after-sales service (Goodman 2014). Therefore, in practice, improving CX by developing a strategy is necessary to build brand awareness, competitive advantages and upgrade future features for the product, in consequence, is to succeed.

A set of starting information that needs to be assembled to develop a CX strategy for an organization should be from as many sources as possible. Usually, it concerns the front-line or customer-facing staff, feedback from customers and staff and discussion with management about the convenience in developing such CX strategy (Villani 2018). After careful analysis and evaluations, a customer journey map and buyer characteristics are created to understand and resolve customer challenges during the customer lifecycle (figure 3). In particular, it means build interactions, ask for feedback on improvement from the users or customers, design educational content, and establish communities for audiences. In chapter 2.4, the author will explain more of these practices and conceive them as criteria for benchmarking in this research.

2.3.2 Conversion marks a milestone

In chapter 5 of Diffusion of Innovation, Rogers stated that the decision about whether to adopt an innovation or not is not an instantaneous act. It is rather a process that happens over time and involves different actions. He presented that this process consists of five stages: Knowledge, Persuasion, Decision, Implementation, and Confirmation. The Decision stage marks the time in which the adopters decide to accept this adoption or to reject it. It could also be recognized as the Purchase stage in figure 3 above (Customer Lifecycle), which is when the prospects decide to become customers. This transformation is called Conversion.

Conversion mostly appears in marketing. There are multiple other conversion stages during a customer journey. For example, from when a person first interacts with company's website to look for options to when he/she clicks download software for trial use, this person transforms from a lead to a prospect. Conversion rate serves as insights on optimization of marketing strategy, to determine a healthy and efficient one. This rate is calculated by dividing the numbers of people who continue to interact after the conversion happens to the number of people generated before the conversion. The higher the rate, the better the strategy is working for an organization. (Hubspot)

In this research, conversion serves as a milestone when prospects decide to purchase and become customers, or when adopters approve the innovation. This conversion happens meaning that this research has succeeded in improving onboarding phase and generating more customers for the commissioning company. The next chapter will explore in detail what onboarding elements the company is using and each definition, usage in enhancing a starting package for customer success in the SaaS industry.

2.4 A look into onboarding elements

This chapter will investigate the criteria of onboarding process for benchmarking later in this research. The commissioning company currently has developed three big categories to enhance the conversion, which are email engagement, knowledge base and service offerings. In figure 3 above about Customer Lifecycle of company X, it contains five practices during the onboarding phase. Since this research only concerns the pre-purchase, "training and development" is not mentioned here because that is only offered after prospects become customers. Furthermore, "personalized demo" will be combined with "proof of concept" under one category named "Service offerings".

2.4.1 Email engagement

For every software vendor, email is a preferred communications channel and the main tool in B2B to increase touchpoints with trial users during this pre-boarding. Email marketing, in general, is to target and engage with the audiences through email. In practice, there are many usages of email marketing, such as to build relationships, increase brand awareness, promote certain contents, market products, generate and nurture leads and prospects (Perricone, Hubspot). The email content may vary from educational content, entertaining, inspiring to convincing content (Chaffey 2018, SmartInsights). During the pre-purchase onboarding phase, email engagement with trial users mostly involves educational and convincing content to help improve relationships and reflects organization customer service. With email engagement, organizations possibly would drive the conversion positively.

During the onboarding phase, email marketing is significant in communicating with prospects. Different email contents serve different purposes. Inspiring content such as welcome and encouraging email boost prospects to keep using the software show that vendors care for their users. Educational content, for example, introducing how-to articles or videos might promote new features and instructing users in achieving the benefit of using the product. Convincing content usually is sent during the last days of trial, because this is when adopters decide whether to approve the innovation or when the users choose to buy or not. This type of content includes previous case studies, advantages compare to competitors or personalized demo to define an outstanding place within the marketplace.

Concerning company X's email marketing, it has incorporated with email automation tool which provides audience segmentation and automatic email sending based on workflow. The tools give convenience in sending emails with less effort. The automation is triggered once a certain action is implemented, for example, download the software. During 30-day trial, company X will automatically spread out seven emails that provide inspiring, educational and convincing content. If there are users respond to one of these contents by replying to emails, this is when sales agents will jump in and offer them service packaging (chapter 2.4.3) to help develop relationship and give personalized customer experience.

After General Data Protection Regulation (GDPR) established in 2016 to help protect the privacy of internet users. Email marketing becomes considerate before sending out to target audiences if those people have not given permission to receive emails. Many SaaS companies are aware of such regulation and start to publish their Privacy Policy and GDPR act on to increase trustworthiness of prospects and how they process data such as email. If the users do not accept any prior consent, then the companies cannot send them emails. To be able to receive permission from new users for sending emails, company X has developed regulations for its users if its application is downloaded, the software vendor has usage of the user data (Elizabeth, Privacy Policies). This way would help the company to capture leads, be able to nurture and convert them into paying customers.

All in all, email marketing is the most powerful communications channel to develop interaction with new users. SaaS businesses can customize their own email contents whether to encourage or to educate people to learn, using an email automation tool to deliver at the right time. Regarding GDPR, SaaS companies might get in trouble if there are no consents from the receiver unless they publish what actions would follow if they keep such data, in this case, is sending emails. For emails, different content would serve different purposes. All will build up relationships with prospects and give organizations a clearer look into their needs or challenges that they might have during this learning stage.

2.4.2 Knowledge base

According to Birkett from Hubspot, a knowledge base is a self-serve library content that includes documentation about a product, a service, or a topic. To be specific, it is a well-arranged set of common technical issues, instructions on software usage and notes on future releases. These contents can be presented using texts like articles or visualizations like infographics or step-by-step videos. The purposes of knowledge base are to scale up customer support, to enhance customer experience and to reduce repetitive works.

It is stated in a research by Zendesk that 67% of customers said that they preferred self-service to speaking to a company agent and 40% of the total respondents would contact the company via email if they cannot find answers to their questions (Zendesk). Additionally, Zendesk suggests that in order to achieve the best result out of a self-served centre, SaaS businesses need to optimize the result for frequent search, to fine-tune the knowledge base with keywords when users type into the search box, and to check for top inquiries by them to predict the trending usage and overall experience for more opportunities in sales.

2.4.3 Service offerings

Customer service is simply put as the interaction between the users and the software vendors (Investopedia). It involves much more than replying to a support ticket or answering a call (Zendesk). It is the support offered to users before or after the purchase, that provides the help they need to achieve better experience with the products (Salesforce). The importance of addressing and resolving issues is why customer service is a crucial part of any organization. In addition, customer service agents would have a tight relationship with customers and would be perfect for opportunities to upsell or cross-sell to enhance customer lifetime value (Hubspot).

SaaS businesses usually divide their service offerings into different packages or tiers, meaning that it would range from free to premium support with value-added services. These are varied depending on the needs. Different product and service pricing should be established to acquire and retain customers. (Wirtz & Lovelock 2018, 381.). Additional components such as professional service usually are sold with a solution to enhance service effectiveness. Value-added service contains consultancy with customer needs, customization of the product, configuration, or ongoing maintenance contracts. Onboarding can also be packaged as a service, generic or customized. Customized onboarding would contain rich information relating to each customer use cases and requirements. Generic ones can be offered for free. (Adams, 98-99). Onboarding service happens after the purchase of products. This service serves customers to get the product up and running as fast and efficiently as possible without customer-side touch.

Company X is currently providing two service packages in addition to free customer support: Personalized demonstration and Proof of Concept (POC).

- Personalized demonstration is a demo based on prospect use cases. This is free of charge and is conducted by either sales or service agents to make demonstration calls with screen share to envision them with the abilities and advantages of the products.
- Proof of Concept is verification of certain ideas or methods that are feasible (Intechcore). The purpose of implementing a POC is to demonstrate functionality and certain customer needs can be achieved with the product. POC comes with an additional fee.

Additional service offerings help organizations increase touchpoints with prospects, understand their requirements and use cases to enhance their experience. Users can choose either to go with additional service or not depending on the enthusiasm of adopting new software. The author introduces service offerings so that readers can understand more of B2B customer experience and how a nurturing program is conducted in SaaS businesses. It is mandatory that customer service should always be included to give customers or users the best experience with a brand, since customer service is a part of customer experience, and customer experience would reflect a brand.

3 Research methodology

After discussing the theoretical framework that is related to this research, the author continues to introduce her research process for data gathering and analysis. In addition to the visualization of the research development, and to obtain the necessary information for analysis, this chapter illustrates descriptive research methods that are used and justification for this approach. The research and analysing approaches are designed to be qualitative. Data collections are both primary and secondary research. Following that, primary data is conducted by interviews with objective opinions. Secondary data are mainly collected subjectively from Internet resources. Additionally, the validity and reliability of the research will also be stated to prove the integrity and ethics of the collected data.

3.1 Research approach and design

In this subchapter, the research approach and design of this thesis will be introduced, justified and discussed to respond to the investigative and research questions (IQs and RQ are presented in chapter 1.2). The research approach is qualitative, in which semi-structured interviews and electronic research are adopted to draw data. Moving forward with data collection method is analysing data techniques to answer investigative questions (IQs). Risk and limitations of this research have already been introduced above in chapters 1.3 and 1.6.

According to Eriksson and Kovalainen (2008, 16), research methodology is to study a given issue or problem in detail in order to understand it better. It is concentrated on the methods which are often divided into methods of data collection, such as interview or observation, and methods of data analysis. They also mentioned that research data consists of collection of empirical data, and research design is a gathering of that data: data types, how to gather, how to access, how to report, what ways to analyse those data, etc (Eriksson & Kovalainen, 29).

The selection of research methods is based on the background and objective of the thesis itself, to compare between the internals and the externals perspectives for further development of the case company. The progress can be broken down into three phases. The first phase is to actively conduct interviews to gather objective thoughts of the case company product from the chosen respondent pool. Meanwhile, the author will begin to use the competitors' applications and convene the data subjectively in the second phase. The source data for this is from the Internet. Finally, to answer the IQs and RQ, these data are analysed and evaluated based on theoretical knowledge. The research structure of this thesis is visualized as figure 4 below.

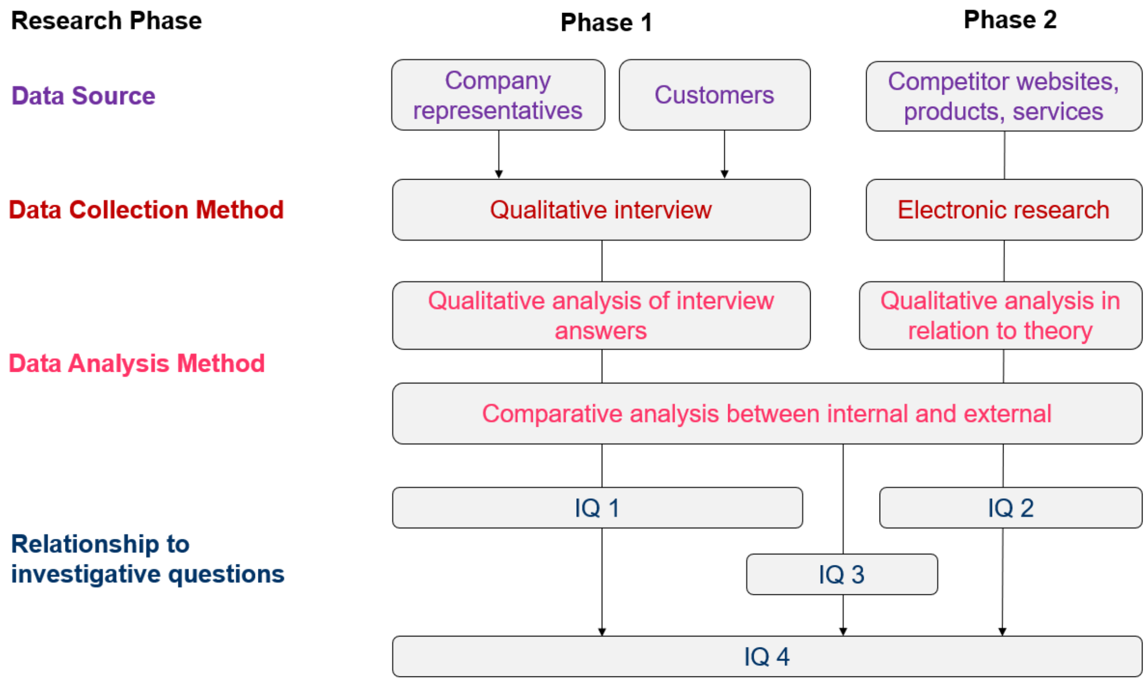

Figure 4. Thesis research structure.

As mentioned briefly above, there will be three stages of the research. The first stage is to interview two respondents individually with open-ended questions. The questions will try to understand the current situation and discover the might-have challenges of company X's onboarding phase (IQ 1). Meanwhile, the author will develop at least three criteria for easier comparison with the externals. During the second stage of the research, the author will implement electronic research to obtain needed information for benchmarking. The child process of this second phase starts with creating an account on Salesforce, downloading the competitors' applications, trying them out for thirty days, engaging with their customer services as much as possible and reporting the author's experience. After carefully experience the product as a user, a qualitative analysis will be conduct for each competitor (IQ 2). After that, the author will construct a comparative analysis between the internal and the external data (IQ 3). To answer IQ 4, the author will provide her recommendations on how to improve company X's onboarding process based on data analysis.

If quantitative research is used to study physical and social phenomena, qualitative research, on the other hand, emphasizes the study of phenomena from the insiders' perspectives with more context (Lapan et l 2011). This research adopts qualitative research to concentrate on the significance and emphasize the necessity to enhance SaaS onboarding process. In order to improve a process that involves stakeholders such as customers, the research firstly needs to gain insights from those who are, have been or were involved in this process, to figure out the current problems and challenges might have. Then, the author will observe other software competitors to conceive empirical data to resolve the issues and to develop further.

3.2 Data collection methods

The data collection methods will be described in detail in this subchapter. As illustrated briefly above, two main methods are used to collect empirical data, qualitative interview and electronic research. Qualitative interview is a semi-structured one by using pre-constructed and open-ended questions to interview stakeholders involved. Meanwhile, to have data for benchmarking or comparative analysis, the author will use and observe the onboarding process of competitive companies through the Internet. The analysis of both processes will focus on the onboarding elements mentioned in chapter 2.4. The third part of the research process it to combine, analyse and compare among the software vendors to learn the strengths and weaknesses to establish recommendations for the commissioning company.

3.2.1 Qualitative interview

Interviews comprise of organized conversation that one-person ask (interviewer) and another person answer (interviewee). Qualitative interviews appear like everyday conversations as interviewer and interviewee usually have a discussion regarding a specific topic but with natural flow. The interviewers often prepare questions relating to the topic and research questions in advance and finally analyse and evaluate results in a concentrated way. (Eriksson & Kovalainen, 78).

There are three types of qualitative interviews: structured and standardized interviews, guided and semi-structured interviews and unstructured, informal, open and narrative interviews. A great asset of this method is that the interview can be kept at an informal and more conversational level meanwhile the topic, prepared questions are organized and all-inclusive. The interviewer would need to cover all the outlined questions and be ready to investigate for extensive responses. The risks might have when choosing this method is that if the interviewer chooses to follow with the prep-questions systematically then important topics or extend answers are difficult to raise and elevated by the respondents. (Eriksson & Kovalainen, 82).

In this research, guided and semi-structured interview method is used because of its flexibility to extend questions that are not prepared if interesting topics are raised from the respondents. The author or interviewer should keep in mind that all topics need to be covered meanwhile raising questions to understand individual cases for greater insights. A list of questions is prepared in advance. Since the customers are from different locations and given the social-distancing regulation in March and April 2020, all interviews would be conducted online using Microsoft Teams. The researcher has prepared a list of ideal respondents to send out interview invitations in February. The criteria for choosing respondents are that they need to initiate the software for the past thirty days as users, can later either become customers or not and encounter at least two of the onboarding elements mentioned in chapter 2.4. As stated in chapter 1.6, the risks lie in the unwillingness to participate in the interview and the diversity of respondents. For this research, the author manages to interview two people and take notes on the spot:

- One person is a sales agent of the commissioning company. This individual would provide valuable insights into prospects if he/she has initiated any feedbacks and could provide her subjective opinion regarding the current onboarding process
- The other one is a first-time and external user that is also seeking for software solutions to adopt and consult her client's usage. She has been using the software moderately for two weeks to acknowledge the commissioning company product.

After taking notes during the interview, the data collected would become textual data and would be part of the primary data in this research. Textual data is empirical materials that are in textual form, which is produced through writing or transcribing in conversation. It is said that the benefits and relevance of textual data are based on the idea of transparency in qualitative interviews. The text is believed to have the ability to tell about the people and issues that they represent (Eriksson & Kovalainen, 89). With this approach of conducting interviews and collecting data, the author would improve the reliability of this research by including other people's opinions about one topic rather than her subjective perspective. With textual data being recorded during the interview, the data would be detached from the context and the individuals, which would minimize the risk of overinterpreting (Eriksson & Kovalainen, 90). The reliability and validity will be of the qualitative interview will be discussed more in chapter 3.4.

Concerning the online method that is unlikely different from the traditional interviews, there are potentials issues with organizing online interviews. As conforming to Eriksson and Kovalainen, the necessity of caution and reflexivity should be considered while implementing online interviews. They express that it is significant for the author to provide accurate information about the research to the interviewees and asks for their consent. Additionally, the researcher needs to protect the confidential information and personal privacy by excluding participants' names, e-mail addresses, companies they are working for, etc. For this research, the author has already omitted participants' personal information from the paper as of the information given when inviting them to the interview. The email sent out to the potential respondents by the author would be included in the Appendices.

3.2.2 Electronic research

The objective of this research is to enhance an onboarding process by benchmarking commissioning company with its competitors. Given the products are online software, in order to collect competitor data, the author would need to intensively use their software, conduct online research and make observations to experience different onboarding processes. Electronic research method is used for its advantages to quickly access information through the Internet and communications. There are multiple sources of information that could be unreliable that the author would address how she can prevent the risk of including untrustworthy data when conducting online research.

According to Erikson and Kovalainen in chapter 8 of Qualitative Methods in Business Research, they state that empirical data are materials or texts that are now produced by the researchers themselves. With the rise of the Internet, there is an excessive amount of existing data under electronic form which contains information regarding industries, companies, people, products and services. The biggest challenge for the author when conducting electronic research is the reliability and quality of the information. By gathering data that is originated from well-know and large organization websites such as press releases or articles, the information becomes useful and trustworthy in qualitative business research. Regarding personal materials such as blogs or journals, which serve as extended online library are also good sources of information because they are posted with comments, thoughts on the news (Eriksson & Kovalainen, 102-103). In this research, the author only uses journals and blogs published by large organizations. In order to verify the reliability of the information written in these journals or blogs, the author would double-check with the referred sources in these materials.

Online observation is chosen to do competitor research. It includes multiple processes that are administered by the author to gather data to answer IQ 2. Firstly, the author would register herself to Salesforce using her student's email, download the competitor applications from AppExchange and start to experience their trial period as a user. The data collected by the author's observation and experience can be subjective and biased. Therefore, the author would keep her opinion as neutral as possible. The experience that is related to the theoretical framework would be documented by the author herself. During online observation phase, there are communications back and forth with the competitor sides such as contacting customer support or sales agent for a demo or assistance while experiencing their applications. This method is to measure the responsiveness and supportiveness of their customer service and encounter customer experience to the fullest. After the trial periods have ended and all data have been collected, the author will start with benchmarking analysis.

3.3 Data analysis method

In previous chapters, the author has introduced research methods and data collection approaches. Continue with this subchapter, as introduced in the research frameworks, benchmarking as a data analysis method will be advanced. Data from qualitative interviews, online research and observation are analysed comparatively. By comparing two or more products or set of data, the author can perceive and adopt suggestions to answer IQ 3, 4 and lastly the research questions.

Benchmarking, also known as comparative analysis, is used in business research to help adopt practices that have been developed successfully by others (50MINUTES 2015). As written by Andersen and Pettersen (1995, 4- 5) in Benchmarking Handbook, there are different types of benchmarking that are defined depending on what is compared and whom it is comparing against. If the comparison based on what is compared, the methods are performance, process and strategic benchmarking. With comparison against whom then different types are internal, competitive, functional and generic benchmarking. Concerning the research objective of this study, which concentrates on the competitors in the same industry, competitive benchmarking has been selected. This approach is said to be an extension of competitor analysis when it concentrates on the best competitors in lieu of those are on the industry average (Andersen & Pettersen 1995, 6).

In this research, three competitors are selected by the commissioning company. Those companies are also recognized as strong competitors and top leaders in the same industry by company X. In order for the readers to get thorough knowledge regarding these competitors, the author would briefly investigate the background and follow trial user journey map to experience the onboarding to the fullest. Additionally, a benchmarking table is created and attached in Appendix 2 to summarize collected data from author's observation. The benchmarking analysis will assist in answering the third IQ, which is to understand what practices or methods are used by the competitors.

3.4 Validity and reliability

Validity and Reliability should always be considered while designing a study, analysing results and determining the quality of the research (Patton 2002). According to Leung 2015, validity in qualitative research defines the appropriateness of the methods, processes and collected data. It is stated in this research to provide credibility whether the research and investigative questions are properly phrases, the methodology design is valid, the data collection and analysis method is applicable and if the conclusions are compelling to the context. Concerning Reliability, he states that it comes with consistency. Researchers must validate the data accuracy context-wise with constant comparison and that the research objective should be “comprehensive and inclusive with reference” (Leung 2015).

As mentioned in “Electronic Research” chapter 3.2.2 that the data collected from the Internet can be unreliable, the author has chosen articles, journals, e-books and information published by well-known organizations and displayed in university library. The information is not fabricated or adjusted by the author. In-text references are indicated after every information that does not belong to her and specified in full under References. If any information does not include references, it would illustrate the author’s perspective regarding a topic at the time.

Regarding the primary data collected by interviews, the respondents who participated in the interview were chosen carefully and would not have any motive to provide false information, hence, the interview data is trustworthy and subjective from respondents’ opinions. As mentioned, the author keeps written notes and transcribes them to data for analysis. Misinterpretation or overinterpretation can be decreased by not attaching personal feeling toward the respondents. Both sides, internal and external of the company were chosen to provide both objective and subjective opinions regarding one topic. Personal information of the interviewees would not be presented because of their own safety and guaranteed to both respondents.

Concerning the observations of the author towards competitors’ onboarding process, it would be kept objective and unbiased as much as possible. By providing the author’s own observation with illustrations and references, the reliability of the data enhances for further analysis. Fabricating information of the competitors, who should be learned from by company X for further improvement, would have no use in this research. Besides, fabricating might result in legal actions and would not be beneficial to the author.

What have mentioned in chapter 3 are the research methods alongside with the credibility that the author has used throughout her study. Qualitative research is adopted alongside interviews and electronic research with the help of the Internet to gather the necessary data for analysing. Benchmarking as a comparative analysis method is also introduced so that the readers can familiarize themselves with this method in qualitative business research. In the next chapter, the author will move on with evaluating and analysing the collected data to answer the investigative questions (IQs) and later answer the research question: “What can be done to develop the company’s customer onboarding process compared to the competitors?”.

4 Research findings

After introducing the definition and methods of conducting this research, this chapter continues by describing the findings of both interviews, electronic findings, observation and benchmarking. For the interview part, the author implements two online interviews to answer IQ 1. One interview is with a company representative and another one is with a customer. Through this, the author will discover the current problems of the company's pre-purchase onboarding phase. Later, the data collection of the three competitors during the same phase would be gathered by herself while trying out the applications. The author, as mentioned in the methods above, will execute electronic observation to assemble the data for benchmarking, which assists in answering IQ 2 and IQ 3. Development suggestions will also be proposed in this chapter resolving IQ 4.

4.1 Interview results

Qualitative interview data will be presented in this subchapter, provide the answers to IQ 1 and later assist in the comparative analysis for IQ 3. The data of online interviews are collected by the author by noting on the spot, which will be analysed in this research to figure out the current strength and weaknesses of the onboarding phase. In advance, the author has prepared two sets of questions for two respondents (presented in Appendix 1), which concentrate on the study of pre-purchase onboarding phase and the experience it gives to users. The questions are designed to explore if each onboarding aspect during the pre-purchase has any effect on the buying decision and the insights on user experience.

The reason for forming two sets of questions is that the two respondents represent different perspectives. The internals are those who create the onboarding process and the externals are users indeed experience the phase. Therefore, questions for the externals would be highly concentrated on the user experience and formed to collect objective opinions regarding the topic. Meanwhile, the questions for the internal agent would gather the subjective opinion other than the author herself and explore if there are any insights from the current customers regarding the onboarding elements. The questions are although prepared in advance, during the interview, the author would improvise exploratory questions in order to understand an issue better. In this study, since the identities of both respondents would not be mentioned, the author names them as follow:

- Respondent I: the company representative who works in sales, engages a lot with leads, prospects, customers, only uses the application for demonstrations, partly manages and implements onboarding phase with communications, creates marketing contents

- Respondent E: is a user that has never experienced the software before, learns to use the software to enrich solutions for this individual consultation services, moderately uses during trial as working on a client's project, has experienced most of means of support.

The current process of the onboarding starts when users click the "Get it now" button from the AppExchange platform to download to Salesforce organization. Once they have downloaded the application, their personal information such as name, email, company and phone would be fetched and put in the vendor's data list. After the installation, users would need to make other configurations and integrations. All of the applications need to have a quick setup guide to assist users completely integrated with their Salesforce organizations. For these are B2B software that involves many levels of users and configurations, they are not as simple as off-you-go solutions. The installed applications would appear in App Launcher (figure 5) in Salesforce org so users can easily access them and retrieve the configuration instruction.

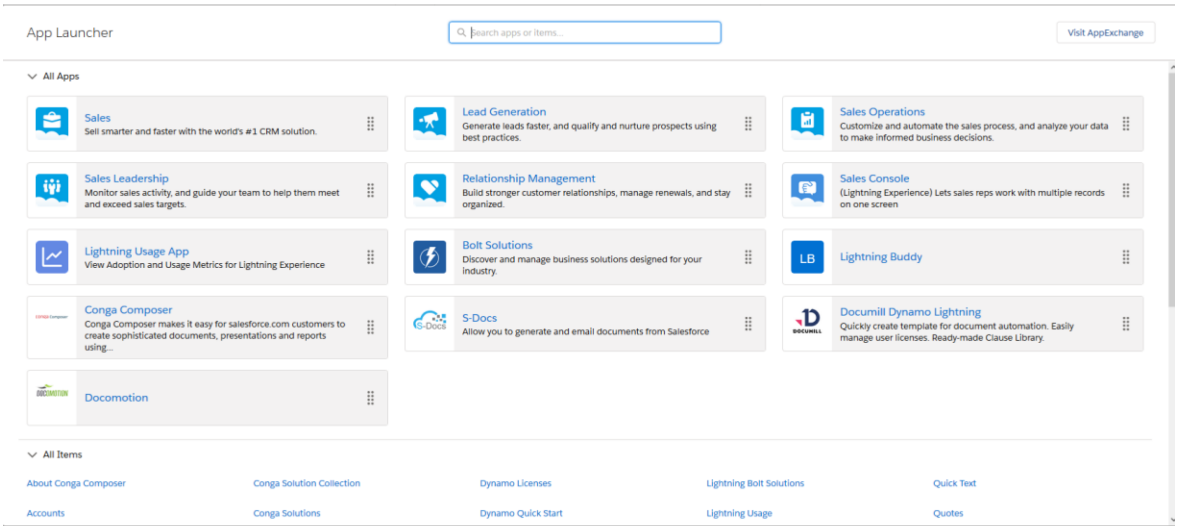

Figure 5: Overview of App Launcher in the author's Salesforce organization

The interviews started off with a general discussion regarding the products and overall experience. According to Respondent E, since she has begun to use the product not until recently, she said that although the user interface of the product is well-organized, for a beginner, it was overwhelming for her. She explained that the strength of the product was browser-based that it could be accessed anywhere with any browser and its interface was organized neatly. Its appearance was considered relatedly to Microsoft Word which was not difficult to get used to. Although the nice-looking interface, respondent E stated that there was so much information condensed in one platform that was confusing for a new user. In addition, the Respondent I, who has more experienced in using the software mentioned that for simple use cases, users would find the software easy to use. On the other hand, with complex and customized use cases, the current knowledge base does not provide enough material and guidance for users to implement. Concerning complicated use cases, usually, users would need to contact customer service and elevate into projects, which are described as proof of concept (POC) projects.

4.1.1 Email marketing and automation

Company X is currently using a third-party application to automate emails and manage email campaigns. Email marketing software helps with sending batch emails and provides email automation which automatically sends out emails base on logic workflow. The action when users download the application from AppExchange is set to trigger the logic to start the automation. Once the automation is triggered, users' email will stay in it, go through all the actions included in the workflow until the end. The figure below illustrates partly a simple workflow in email automation. For example, the condition to send out email "New DL3" is to wait for four days after sending out the email "New DL2".

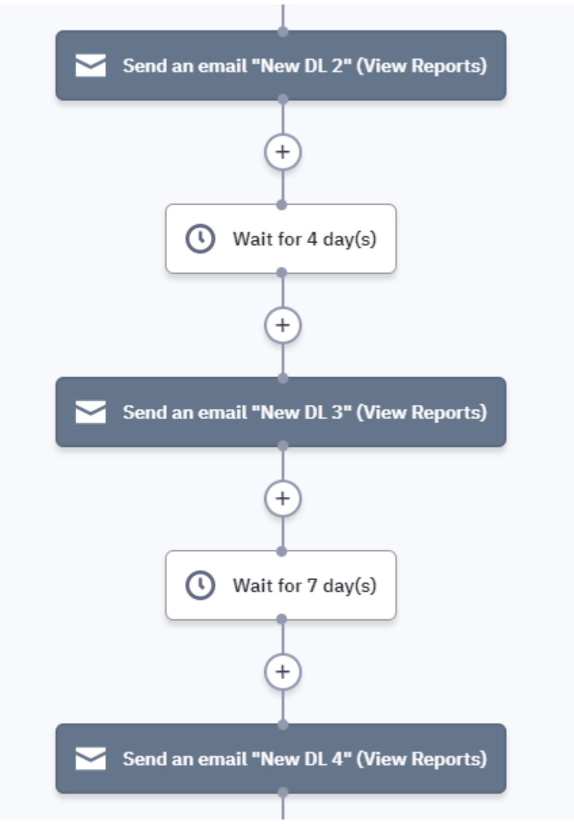

Figure 6: A simple logic flow in company X's email automation

The idea of implementing email automation is that the company can prepare email content upfront, implement the logic to send them within 30-day trials, track how people would respond to marketing emails and if they help to convert leads. Email content as described in chapter 2.4.1 contains convince and educate contents that encourage users to try out means of support and provide related guidance in order to have a productive trial period.

According to Respondent I, email automation is sufficient for engaging with customers and enhancing brand identity, however, it is not the most optimal way in terms of reaching the correct people. The individual stated that people sometimes use fabricated or mock emails when they try to download the application, which makes the email automation fetches the wrong data. This is an unavoidable issue if users purposely manipulate information beforehand. Another reason why it is not the most optimal is that the emails sent can go to spam boxes in the receiver's email instead of the main inbox, which would result in the low open rate. Regarding the contents, the respondent I agrees that types of contents should be varied and need updates since the last update was six months ago. Meanwhile, Respondent E did not receive any of those marketing emails. The reason is that she is not the administrator of her Salesforce organization, who directly install the application; therefore, she did not have any input towards the email automation and its contents.

Although email automation is a good way to engage with users and increase brand identity, challenges such as fetching email data is inevitable, contents that need to be improved and tested to stay out of the spam folder. According to ActiveCampaign (2020), which is an email marketing third-party software, there are multiple methods to improve email deliverability. Recommendable approaches of improving are focusing on engaging content, personalizing emails, use a trustworthy 'from' email, test with different subject lines and check if the email would go to spam by sending test emails to personal email.

4.1.2 Knowledge base

Concerning the knowledge base, it comprises documentation, guidance articles and release notes to provide users with different topics, application functionalities and how to implements them. Software vendors implement and invest in knowledge base so that users can find information and do it themselves if they are not willing to contact service agents. Furthermore, the vendors can simplify the work process of customer support and decrease the implementing and maintaining cost. (Hubspot 2020)

Commissioning company has a website that dedicates only for documentation, is called Online Resource Centre. Around 93% of the content are written texts. The remaining contents are screenshots and videos of certain processes to visually guide users to carry out implementation. The picture below is a screenshot from the company's resource centre, where they keep all the announcements and instructions on the latest updates and instructions on how to use the application. The blue boxes are the most common threads that users usually search for in this knowledge base. Additionally, users can type in any keyword to search for necessary information.

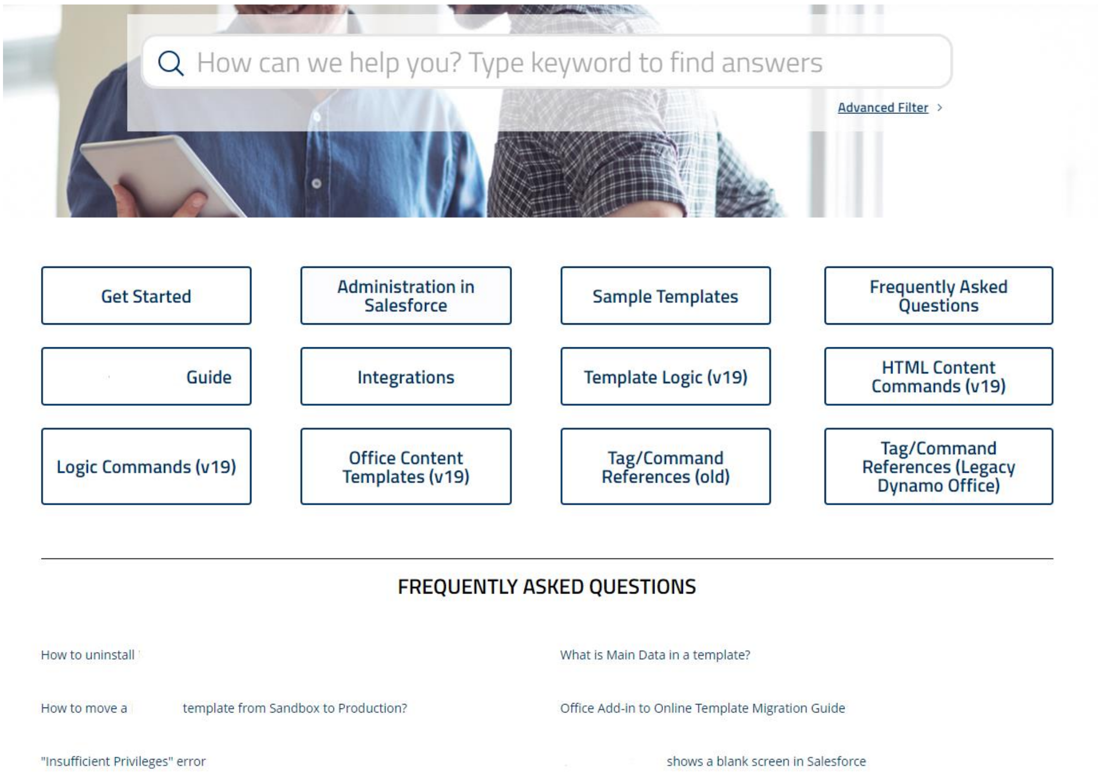

Figure 7: Company X's knowledge base website

According to Respondent I, the knowledge base is simple in navigating but difficult in searching for needed articles. She explained that she sometimes has trouble in finding essential information because she did not know what kind of keywords to type in the search bar and what article to choose. Moreover, some articles contain technical terms that are difficult to understand and follow. Meanwhile, respondent E has another perspective when she mentioned that the articles are well-written and understandable. However, both of them have the same opinion that the articles instruct only beginner steps. When it comes to advanced features or complex use cases, support from the service side is always involved. Respondent E also agrees that there are some articles that are exceptionally technical that she is not able to understand.

In the picture below, the author tries to search for "add image" (left) and "add picture" (right) in the knowledge base. Although the purposes of these searches are the same, the results are different. This means that if users do not use the correct keywords or phrases, they are not able to find what they need. Therefore, keyword research within the knowledge base should be improved by adding more relevant texts and tags in the content.

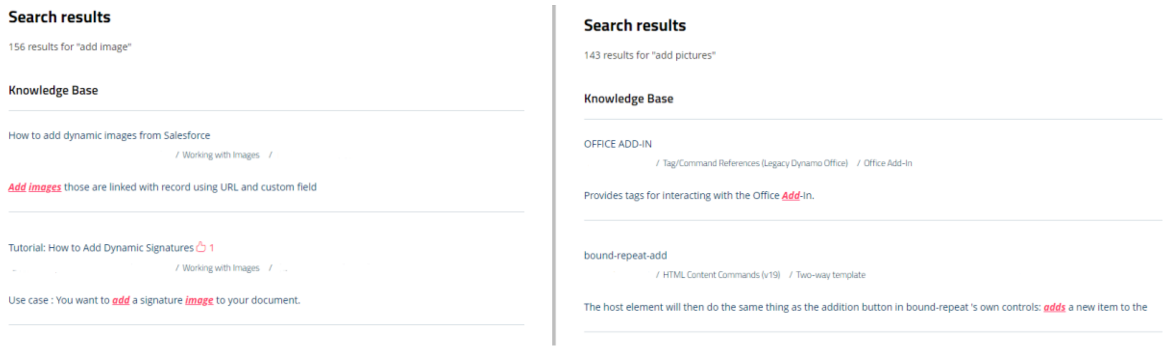

Figure 8: Search results for “add image” and “add pictures”

In addition to that, both respondents commented on the contents that it should have more visual contents such as videos or pictures to increase comprehensiveness and engaging. According to PopVideo’s study (2016), people are likely to remember 95% of the content when they view videos comparing to reading texts. The benefit of having more visual content would improve the engagement rate. An article on Hubspot (2017) states that “showing is better than telling”. For textual content might contain technical or unfamiliar words or phrases that cause frustration to those who read it, actions through videos will provide more context and clear content through visualization for unskilled users.

An interesting use case by Vidyard has proven that video content would result in more searches and productivity. They combine textual content and inline embedded videos in order to complement the written texts and assist in learning. The outcome is worthwhile when number of searches emerges from video views and number of call volume decrease drastically. Besides, the increase in number of customers viewing videos to resolve issues and acknowledge more of the platform is undeniable. (Hubspot 2017)

4.1.3 Service offering

Trial is the period for companies to capture prospects and turn them into paying customers. Therefore, service offerings such as active customer support and premium services should be provided and proposed to those users when necessary. Bordeaux, the author of the article “What is Customer Experience?” on Hubspot (2019), states that communications back and forth with customer support would increase touchpoints as well as improve customer experience. He also indicates the significance of customer experience would benefit one’s business by building brand position and awareness. Recommendations, online reviews and feedback from the customers would increase visibility across websites and communities. In order to measure customer experience, surveys asking about customer experience and for insights in product development would be great assets to the overall advancement of the company. According to Hubspot (2019), there are multiple methods to enhance customer experience, for example, organizations establish customer journey map and buyer characteristic to understand their challenges, engage with customers, proactively ask for feedback from customers on how to improve, implement educational content such as blogs and videos, as well as build audience communities.

Currently, company X offers support to trial users to encourage and assist them in familiarizing themselves with the product and service. According to respondent I, she mentioned that she had been receiving oral feedbacks from customers that the support team was helpful and dedicated. They were friendly and responsive whenever there are questions and issues raised by customers, users or partners regarding technical problems. Additionally, respondent E had such an experience when she tried to reach company X for support. She pointed out that customer support agents were very thoughtful and quick. She was reaching out to support as she could not find the answers on Resource Centre. However, one external insight validating a good support system is not convincing enough. Besides, the input from the internal can become subjective. Therefore, a rating or feedback system should be considered in development in order to validate a good support system. Also, a rating system measuring customer experience towards a brand would become a branding asset for the commissioning company. As studied by Gartner, 89 per cent of the business leaders consider that customer experience will be their main competitive advantage by 2016 (Gartner Inc 2014).

The commissioning company also offers Proof-of-concept (POC) project package. It describes a concept design using the product and demonstrating that the features are feasible to fit with a business need. This provides prospects with visibility and ability of the product without them trying out or being involved in the technical side. Usually, these prospects have already acknowledged the solution and established a budget and timeline to adapt it. This is when customer success team would need to keep communications and assure the outcome is effective and successful. Regarding other service offerings as included in chapter 2.4, personalized demonstration and POC are the two most common offers during onboarding phase. SaaS vendors provide these service packages to push projects and turn users into paying customers by demonstrating product's feature in practice. Respondent I, who works in sales, states that it would be favourable to have resources and establish these packages to boost sales cycles. On the other hand, respondent E who is a consultant indicates that service packages would be reasonable for large enterprises. She explained that for small businesses one service package would cost them one year of license. Evaluating from the two insights, the emerge in creating adjustable service packages is undeniable.

After having analysed the interview results, the author has figured out that the current strengths of company X' s onboarding phase is customer support system. They are providing quick and helpful assistances when necessary. However, investment in online review needs to be considered in development suggestions as it would validate the support effectiveness as well as build positive customer experience towards a brand. Concerning the weaknesses, company X needs to optimize its knowledge base further with more content such as instruction videos with voice over, better search and navigation for users. Furthermore, different service packages and pricing structures need to be visible and adjustable based on user needs.

4.2 Onboarding benchmark

This subchapter would present the author findings of online observation of the top three competitors from the same industry. The data will assist in answering IQ 2, which is "What are the selected competitors' customer onboarding processes like?". The three competitors are chosen by the commissioning company and are the top leaders that provide the same software solutions as company X. Comparative analysis is used to explore the best practices so that later the author can develop suggestions. It is important to keep in mind that large companies have more resources and their successful adapted methods might not necessarily be suitable for another company. Therefore, choice and adjustments need to be made before giving recommendations to the commissioning company.

The benchmarking table is presented in Appendix 2 with the author's observation of the three competitors. The benchmark data is relevant for March-May 2020 period. In this chapter, the author will present key points taken from the table. After going through all the attributes, development suggestions will be established in accordance with company X as well as examples based on the comparative analysis and literature review. The author will follow the same process with every competitor. Trial user journey is such a process and is generalized in the figure below. It starts with downloading from AppExchange, configuring in Salesforce, experiencing knowledge base, trying out application, engaging with customer support, receiving email marketing, asking for personalized demonstration and ending with receiving the user experience during trial. The author would follow this journey map to test and collect data from every aspect of the onboarding.

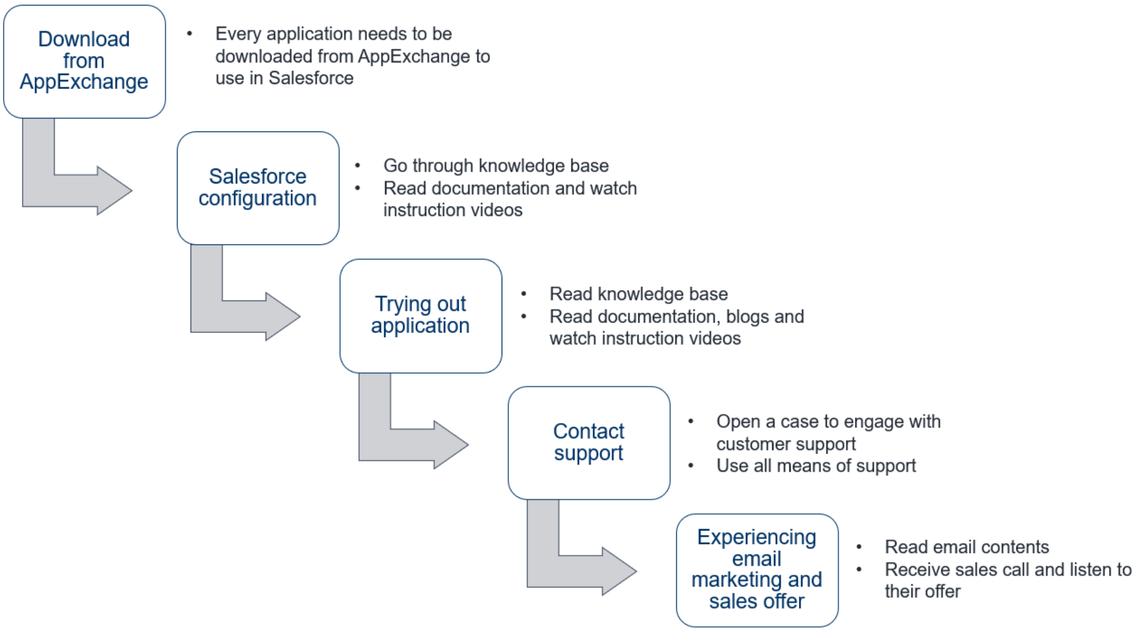

Figure 9: A generic trial user journey

The trial user journey was established to ensure that the author would not leave any onboarding aspect inexperience. As illustrated in the figure above, knowledge base would be accommodated during configuration and trying out stages as the author would learn from it to implement the software. After testing the usage, the author would contact customer support to resolve a random issue. This observation by the author would experience how the customer support works and if they would have any offer. During the trial period, the author would pay attention to received emails to see what kind of email contents are using.

4.2.1 Conga Composer by Conga

According to BusinessWire (2019), Conga is the leader in the field that has the most downloads on AppExchange. They claim to have nearly one million users across 85 countries. The company was founded in 2006 and is a private one with around 650 employees. Conga Composer is one of their suite solutions, that has a similar solution with company X's product. The software can be integrated with Salesforce to enhance business productivity by reducing time in creating documents. With such a tremendous number of users, the company has developed and invested a lot in its communities, research and development to attract new users as well as retain the current ones.

After careful observation and usage of Conga Composer, the author has learned that Conga provides multiple means of support and engagement, for example, textual knowledge base, Conga University, different packages of customer service, engaging emails and educational video contents. Following downloading Conga Composer from AppExchange step, some configurations in Salesforce are required to get the application up and running. Inside Salesforce, Conga Quick Start tab presents two different methods to start using the product: Quick Start and Document Automation Wizard. The author chose Quick Start to begin setting up the application. The process only took ten minutes to finish. Afterward, the application was ready for its first usage. The author was able to operate the application without having to go through the Knowledge Base.

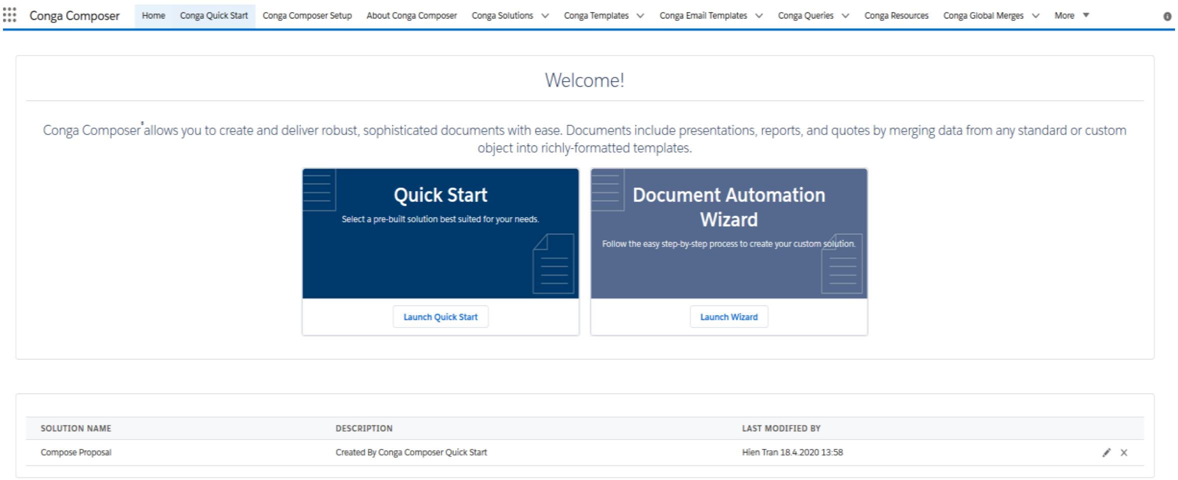

Figure 10: Conga setup interface in Salesforce (Salesforce personal org 2020)

Concerning Conga knowledge base, the content type is varied with images in line with texts and a separate video library. In addition, to assist users in learning effectively, Conga establishes Conga University where instructions designed as virtual courses with textual, graphics contents and quizzes. Besides that, with Conga University people can also achieve certificates as rewards. Conga University can be accessible by anyone. Figure 11 below is the front page of Conga University. Registers can easily browse and filter courses to choose from. Courses by Conga University are simplified and designed to ask users to practice at the same time. ‘Challenge’ section is provided in each course to review what has been learned by answering quizzes. The university currently has less than one hundred courses divided across Conga products. For Conga Composer, there are around 30 courses providing instruction on how to use the application.

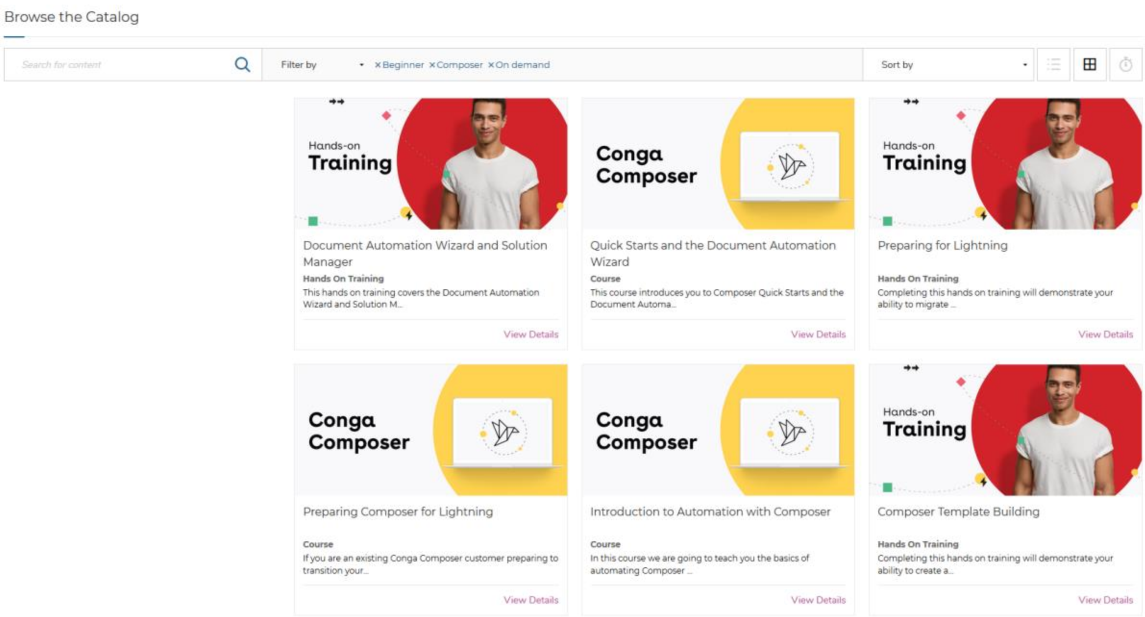

Figure 11: Conga University user interface (Conga University 2020)

Regarding emails, the author had not received any marketing emails during the trial period. Only after the trial has ended, marketing emails from Conga were sent. During the trial, the author has opened a case as there was an error in usage. The email support took around half a day for the author to receive the answer. Nevertheless, the case was closed without being resolved as the author is only a trial user, not yet a paying customer. At the same time, the case was assigned to a Conga sales agent. The agent reached out to the author to ask about the use case and tried to set up a call to move forward with a license purchase.

Conga also provides online chat as one of the support communications. After being rejected to solve the issue, the author has contacted for help in Conga online chat. The author received the answer after approximately five minutes. The chat agent was helpful and happy to resolve the issue, although she did mention that chat and email support is only for paying customers. To verify this claim, according to the “5-star Support” Conga website, the company mentions that “All product purchases include a basic customer support package…” (Conga 2020).

In consequence, Conga, which has approximately one million users, has invested substantially in building its learning base and community to enhance customer experience. Most of its developments require a lot of resources that are nearly impossible for commissioning company to follow. However, these practices can be chosen and adjusted to fit company X’s situation. To summarize, the key strengths taken from Onboarding phase of Conga Composer are:

- Conga University with virtual course eliminates traditional learning and assist in learning effectively
- Knowledge base with organized categories, image contents in line with texts
- Marketing and educational contents video library with voice over
- Conga Quick Setup is truly agile and effective for users to test
- Online chat support that answers almost instantly

4.2.2 PandaDoc

PandaDoc, founded in 2013 in California, has over 17000 customers. The company is backed by Microsoft Ventures, HubSpot, and Rembrandt Venture Partners. The software is claimed to be highly rated by its customers for years on online review sites such as G2, TrustRadius, Capterra, and Gartner (PandaDoc 2020). PandaDoc also provides the same software solution with company X, to efficiently and effectively create documents within a few clicks.

The experience of using PandaDoc was a bit different from Conga as the company has a different approach to developing its application. Besides downloading from AppExchange, users also need to create user accounts on PandaDoc platform. After successfully creating credentials for login, integration with Salesforce needs to be implemented. Figure 11 presents the Quick Setup tab of PandaDoc inside Salesforce. Setup instructions are listed based on user needs and hyperlinked to redirect to its knowledge base.

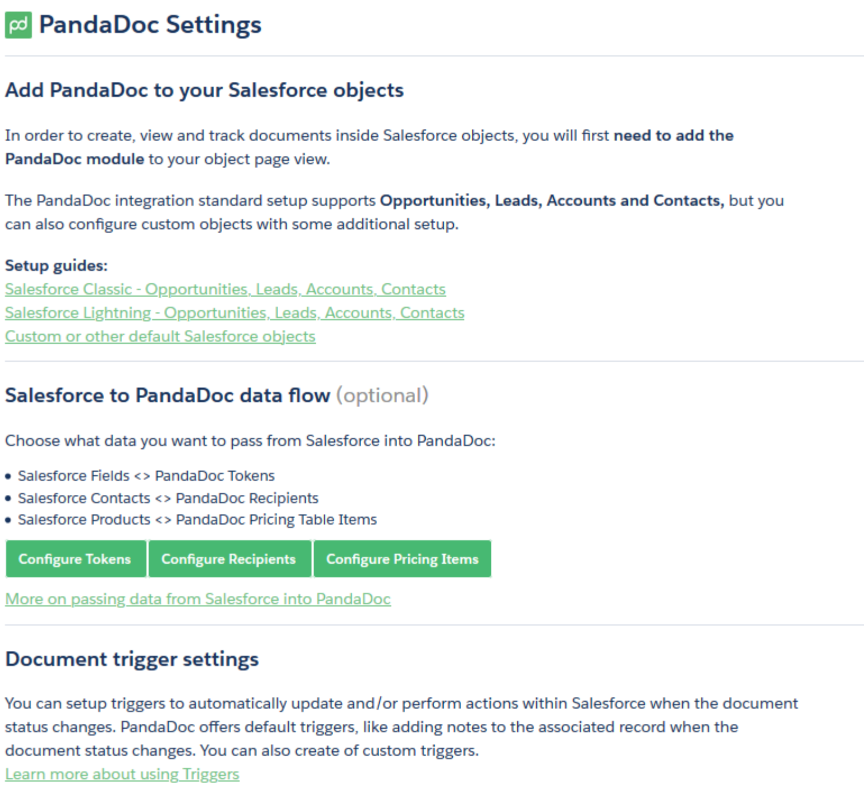

Figure 12: PandaDoc setup interface in Salesforce (Salesforce personal org 2020)

The knowledge base, which is called PandaDoc Help Centre, is organized neatly and depends on user demands. The article content includes both textual and visual contents. Each article or instruction is condensed on one page without having to switch to a different page for next steps (PandaDoc Help Center 2020). The overall experience was practicable for the author to experience PandaDoc knowledge base. The information was easy to search for and rememberable with a variation of contents. Besides the knowledge base, PandaDoc establishes video playlists on their YouTube Channel to enrich their content and also to host their videos for the knowledge base.

After the integration with Salesforce, the author has tried to book a meeting through PandaDoc platform. The purpose of the meeting was to resolve an issue of Salesforce integration. During the call, the support agent implemented a screen share in order to help to resolve. After the call, he also summarized with an email providing a link to the knowledge base where the author can resolve the issue. The support agent was helpful and Aside from support calls, PandaDoc provides weekly webinars to train new users and to answer questions. These webinars are live calling which can be participated by anyone (Onboarding Webinars 2020).

Regarding service offerings, on PandaDoc website, it provides onboarding packages in three tiers with three pricing structures (PandaDoc Onboarding Services 2020). Depends on the user needs and budgets, they can choose which onboarding package to proceed. Different pricing package comes with the amount of service offered by the company. The onboarding service provided by PandaDoc is seemingly similar to POC service provided by company X when it does not mention if this requires PandaDoc software licenses. Furthermore, the service provided has the same purposes by offering projects and customizing answers that match customer requirements using its application.

PandaDoc platform operates individually without Salesforce environment, different from Conga, the third competitor (Docomotion) and company X, who rely heavily on Salesforce. Its groups of customers are divided depends on their customer relationship platforms (Appendix 2). Concerning that, the support team is accessible and productive to understand the use cases and instruct them thoroughly. Regarding their knowledge base, it seems to be attainable and memorable with visual content. Free participation in weekly webinars for live instructions as well as Q&A (questions and answers) enrich their support means and is adaptable for company X. To sum up, PandaDoc has developed the following influences:

- Helpful support with meeting call to resolve issues

- Knowledge base is organized and condensed with textual, image and video contents
- Free weekly webinars for guiding and training to use the software
- Offered different onboarding packages in order to convert prospects into paying customer more quickly

4.2.3 Docomotion

Docomotion was founded in 2014 in Israel (Docomotion LinkedIn 2020). The company is an SME that has approximately twenty employees. Docomotion develops its product that produces the same solution with company X. The company was established later than company X, but its customer base is greater. With such a customer base, Docomotion manages to maintain its 5-star reviews on AppExchange with most of them compliments the support team (AppExchange).

After downloading from AppExchange, the author started the Salesforce configuration with Docomotion. In its Quick Start tab in Salesforce, a replicate of the knowledge base website displays. Its knowledge base website has various categories divided into each phase of the implementation. A search bar is available for users to find the necessary information. Its knowledge base includes both textual and image contents. It seems that texts dominate the content which make the instruction quite complicated to follow. The installation process took around thirty minutes to finish given the nature of the product and the knowledge base itself. The following figure is a screenshot of Docomotion tab that can be noticed inside Salesforce after users have downloaded the application.

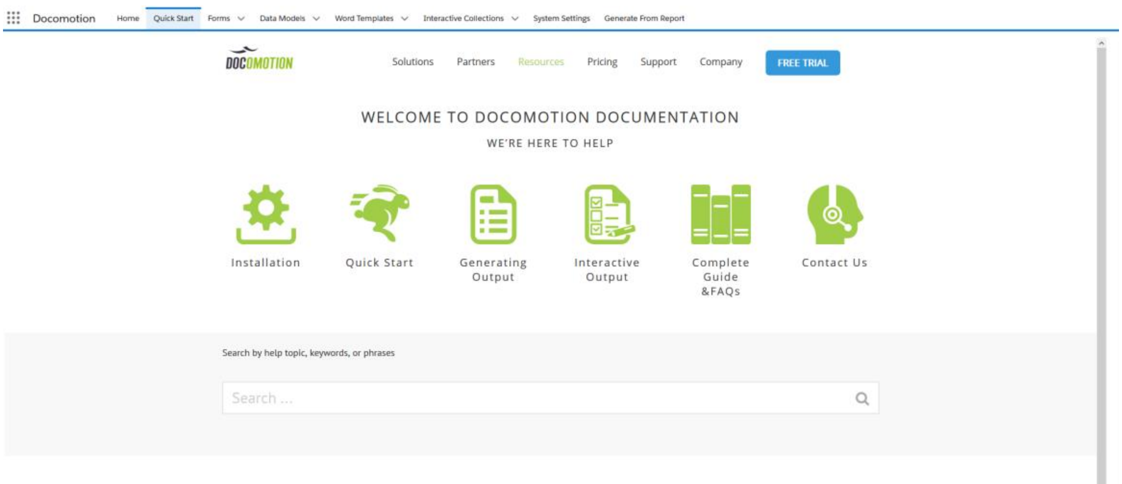

Figure 13: Docomotion setup interface in Salesforce (Salesforce personal org 2020)

In addition to the knowledge base, to help users practice the application, Docomotion provides instruction videos on their YouTube channel. The video playlist is unobtainable from the website because it is not mentioned. The author only figured out when she explored its social media channels. Regarding the outlook, the videos need to be organized into different categories (playlists) so that users would be able to know where to search for. (YouTube)

Docomotion has the same approach as Conga when they limit their customer service to trial users. When the author tried to contact support team, the support team replied that they only worked with users owning business emails. Also, after downloading, a sales agent from Docomotion tried to reach out and to offer personalized demonstrations. On their website, it offers two customer support packages for licensing customers (Docomotion, Pricing 2020). An interesting practice by Docomotion regarding its marketing and support is that it establishes a community where it adds all of their prospects and customers to. Whenever there is news, feature updates, announcements or bug fixes, marketing team simply posts into this community so that everyone can see and acknowledge. Regarding emails, it increases its sales content emails where offers are proposed, and special use cases are introduced. Sales agents would constantly follow up with trial users to establish touchpoints and propose service offerings.

Docomotion company size is rather larger than company X with more employees. Although their support scores 5 out of 5 stars on AppExchange review, the author only experienced a part of it. Therefore, key insights can be taken from Docomotion onboarding phase are:

- Knowledge base is easy to access but complicating to follow
- It is organized and condensed with textual and image contents, no videos
- Instruction and demonstration videos to show application features
- Establishment of a community to announce the latest news, feature updates, and general marketing
- Engage with sales talk to understand the use case of the author

4.3 Development suggestions

After having discussed the three competitors and their onboarding elements, in this subchapter, the author would propose her suggestions on development of onboarding phase for company X. In this session, the fourth investigative question “What development suggestions can be made to improve the case company's customer onboarding process?” is answered. By utilizing other practices and adjusting to fit with the company resources, three suggestions have been acquired following the three elements of onboarding: knowledge base, service offerings and engagement emails.

4.3.1 Improvement proposal 1: Self-service revamp with visual contents

Considering that company X might not have enough resources to implement practices like Conga University, some methods taken from the key strengths can be adapted and improved by the commissioning company. For knowledge base development, company X should improve its Resource Centre visibility and its contents. At the same time, internally, company X needs to reorganize the articles and develop tracking systems on this website. According to a survey in 2019 by Microsoft, 66 per cent of the global respondents stated that they would begin with a self-service before engaging with customer service. Also, it appeared that 12 per cent found it frustrating to not being able to resolve an issue themselves by using a self-serve centre (Mircosoft 2019).

Resulting from the interview data, company X knowledge base is insufficient and unobtainable. The navigation inside the knowledge base is poorly organized that it is hard for users to search for what they need. Mentioning the content, textual content must have covered 89 per cent of the total content. All text instructions are hard to follow and processed with technical terms. By increasing the number of video and image content in guiding articles can assist in application adaptation. Visualization helps users implement the application in practice which makes the knowledge more memorable. Below is an example of an article on company X's knowledge base that contains mostly texts.

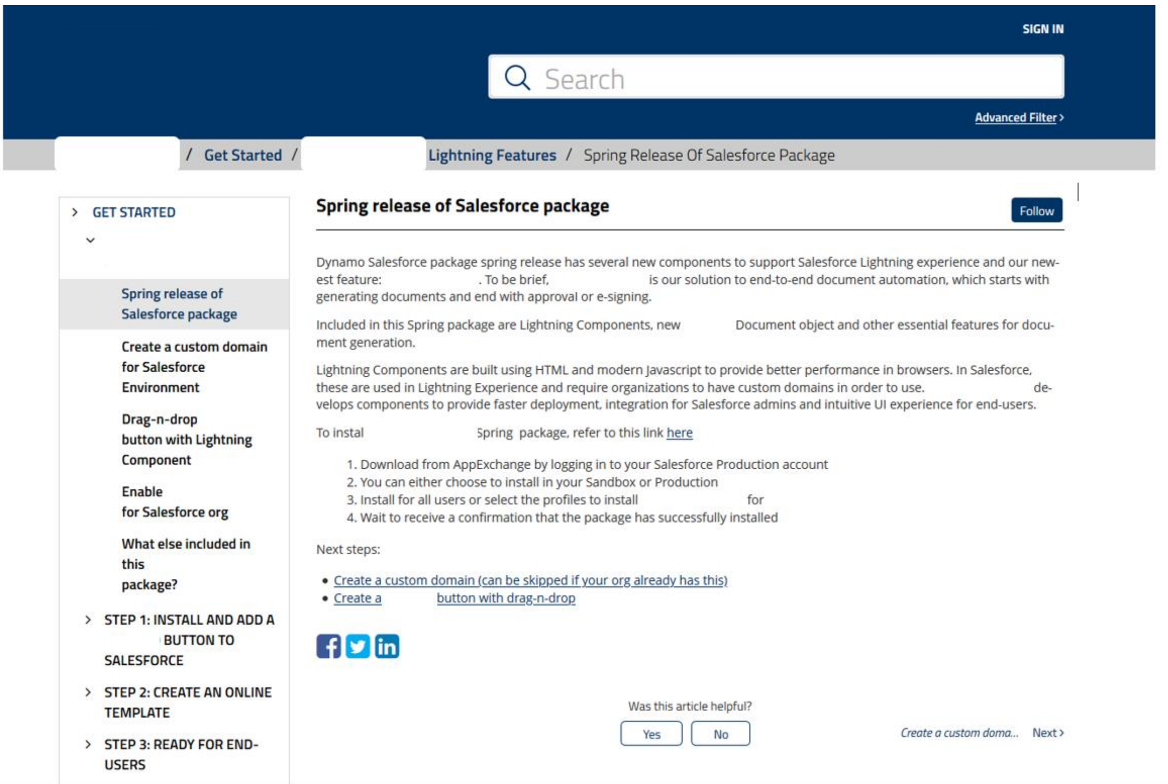

Figure 14: Company X Knowledge Base.

Concerning search function inside knowledge base, various keywords and tags included in each article are essential to improve it. The keywords and tags need to be related to the main content. Predicting and exploring keywords and tags can be done through tracking systems using Google Analytics or the provider itself (company X is using another third party to develop the knowledge base). Moreover, tracking what keywords are used and which most-read articles are would help to understand customer requirements and issues to enrich the knowledge base as well as predict product trends for further development.

As surveyed by Microsoft (2019), 88 percent of the customers expect a brand to offer an online self-service portal. Additionally, two-thirds of the total prefer trying to solve the issue on their own, therefore, self-service such as knowledge base should be accessible (Microsoft 2019). In order to increase the visibility, company X's knowledge base should be mentioned whenever necessary, such as in communications, through marketing and website visibility. According to the trial user journey map (figure 9), users will first encounter with the Quick setup tab in Salesforce. Therefore, introducing knowledge base in the appearance will direct users to the self-service portal. Developing intuitive user interface and truly quick setup like Conga Composer are considerable, however, it would involve more resources regarding time and people. It is understandable that a ten-minute Quick Setup is preferred to a thirty-minute one.

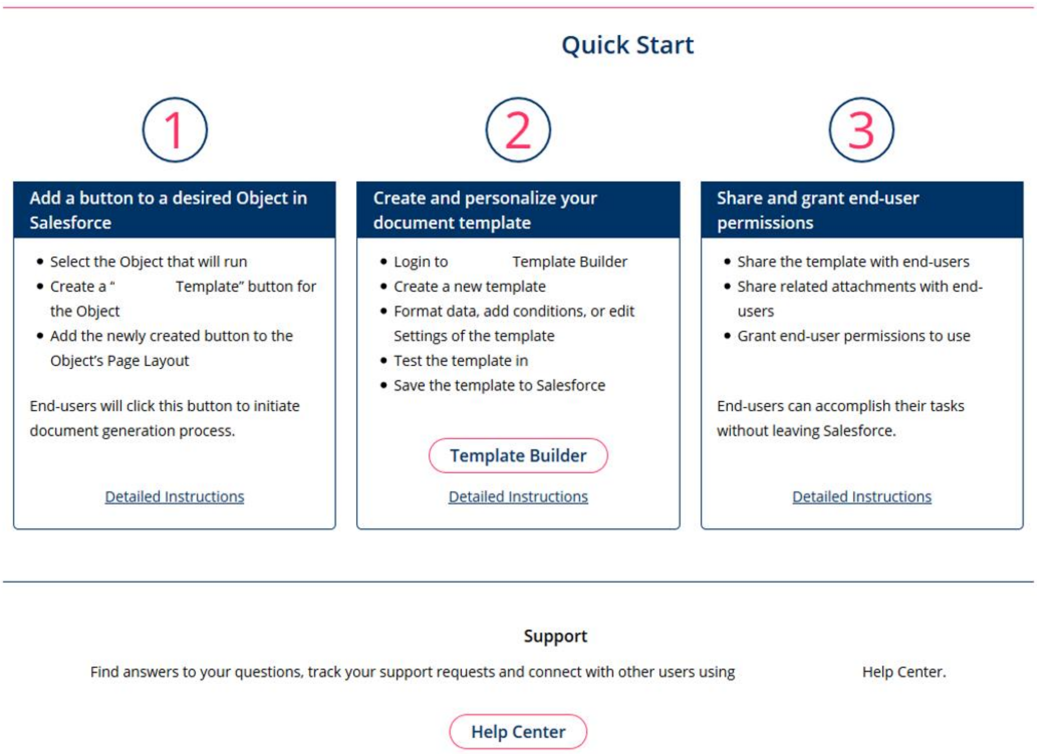

Figure 15: Company X's Quick Setup interface in Salesforce after downloading (Salesforce personal org 2020)

The instruction in the Quick Setup tab contains only texts and involves a lot of steps before users can implement the software. The author's suggestion is to include carousel images or motion graphics to step-by-step instruct users inside Salesforce. Visualization is better than all text guide. For advanced implementation, Resource Centre link is visible and accessible for "Detailed instructions". For example, the below figure is a step in PandaDoc Quick Setup. Users can find this Salesforce integration instruction on their own platform after registration. The graphics are mostly in motion enables gradual practice visualization for users to follow. Also, the steps are developed to be coherent with real practices that force users to implement while following the instructions.

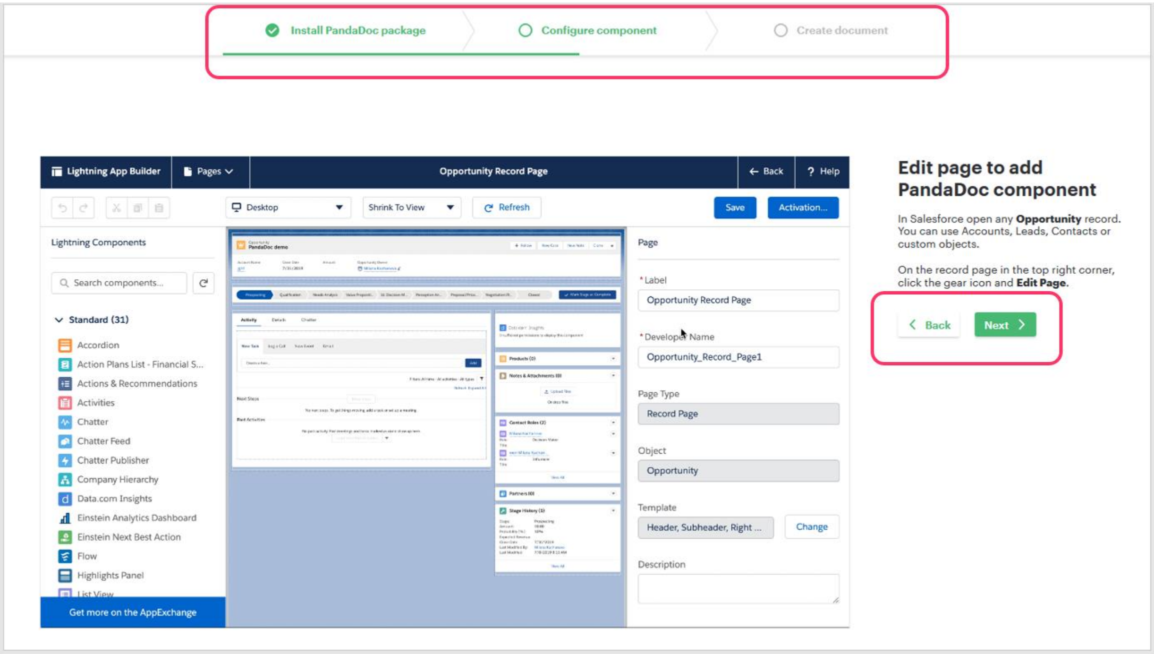

Figure 16: Salesforce integration instruction (PandaDoc Application Platform 2020)

Visualization the Quick Setup can be fancy for company X as it would require a lot of time to design and create the instruction flow. However, if the company can implement such a "quick" installation guide for users, user experience and impression towards the product itself can be enhanced for its intuitiveness. In regard to the knowledge base, it is urgent for company X to reorganize the articles and add more viewable content where necessary. Even if the text-based content is unclear or complicated for users, videos would visualize the course of actions needed for the descriptive words (Hubspot 2020).

The idea of implementing weekly webinars by PandaDoc should be considered in long-term development. This is a good way to provide educational content and engage with trial users and customers. Live webinars resolving issues with Q&A section would not only provide guidance but also enhance user experience towards the brand or the organization. In order to implement this webinar, the author suggests customer service agent and sales team spare at least 2 hours each week to host an online webinar. The registration can be published on the website or introduced through communications with users. According to Hubspot (2019), webinar is a cost-effective method in reaching multiple audiences at once. With a webinar, sales team can demonstrate features, updates on the product side, and how the features can benefit user needs, meanwhile, support team can educate attendees on how to use the product (Hubspot 2019).

In conclusion, improving self-service contents with graphics and videos are essential in development since it not only reduces number of support call and tickets but also increases user experience towards a brand. Additionally, providing free live webinars can increase conversions and improve brand awareness. The method is budget-friendly and should be adopted by company X.

4.3.2 Improvement proposal 2: Service packages, limit support and engagement emails

This recommendation would involve both the sales department and the service team when it comes to selling a service. Establishing different service packages with adjustable pricing would enable variation of choices for users to choose from. Service pricing depends on the amount of service provided and customer requirements. The urgency in developing service packages is that prospects who want to skip the trial usage and see the products in action can purchase. Proof-of-concept, personalized demo or onboarding service are such service packages. In addition, company X should limit its free support to trial users as lack of resources.

Concerning service packages, sales or customer success agents can engage users easier with their offers. Interacting with sales emails could increase the touchpoints and acknowledge the user needs or intentions towards the product. In order to develop service packages, the features or services include should mention clearly to differentiate among the packages. For example, PandaDoc has differentiated its Onboarding packages and published them on the website. This is visible for users who want to push the adaptation process by purchasing the service package that fits their needs and requirements the most.

Packages

Starter

Ready to ease into PandaDoc, but don't have the budget for our full Onboarding Services? Let's get you started off on the right foot with PandaDoc.

- Standard virtual group admin training
- One hour of personalized training for your Admin
- 5 pages of content conversion

Operational excellence

We know our platform best and have onboarded thousands of users. By training your Admins, we'll make sure your people know everything they need to know when it comes time to launch.

- Deployment Kick-off call
- Virtual Group Admin Training
- Advanced Administrator training
- Admin Training Guide
- Virtual Team Training
- End-user/Team training guide
- Up to 15 pages of content converted
- Access to support

Sales accelerator

PandaDoc exists to accelerate the way you transact while maintaining a personalized touch. A PandaDoc Onboarding Specialist will assess your sales transaction process and set up your workspace to give you a competitive edge. We will review your organization's end-to-end sales document process and set up your account to maximize your team's efficiency around contracts, quotes, and proposals.

- Deployment Kick-off call
- Virtual group admin training
- Sales process assessment
- CRM/integration assistance
- Pricing table and product catalog setup

Figure 17: Onboarding packages provided by PandaDoc (PandaDoc 2020)

On the other hand, support team of company X should maintain their free support to help users solving issues regarding product implementation. However, with the company's current situation, it is hard to push free support as lacking resources and increasing workload. There must be some limitations established to lessen the assignments for support team as well as to sell the service packages. The limitations should be mentioned precisely on the pricing structure so that users engage with customer support would not cross the line between trial users and paying customers. Meanwhile, maintaining communications with trial users when necessary to assist them in resolving issues would aid in increasing user experience.

Concerning email engagements, since most of the emails received from the competitors during trial phase are sales content email. The author does not have any suggestions for changing the current email content. However, in accordance with the development of service packages, number of sales emails should be increased to offer users with the packages. Sales emails could also increase engagements with users by asking for their requirements and use cases. After understanding the needs, proposals and services could be adjusted to fit their needs.

To put everything in a nutshell, Improvement Proposal 2 implementation would involve the coordination of the sales team. By developing different pricing structures for service packages and offering them to users, it would increase communications between trial users and the brand. Free support should be limited depending on cases. Entirely removing the free support could cause dissatisfaction towards the customer service and finally, towards a brand. According to Microsoft (2019), 58 per cent of the respondents found the customer service was very important in their choice of a brand.

4.3.3 Improvement proposal 3: Encouraging online reviews

Online reviews are feedbacks provided by users expressing their perspective and experience towards a brand. These are published online in some review platforms, especially in this case is AppExchange. Negative reviews provide companies with opportunities to learn and develop. Positive ones contribute to the brand identity, help organizations acknowledge user experience and are one of the best referrals for future customers. (Hubspot 2019).

Company X has not invested in its online reviews for more than a year now. Microsoft's survey has stated that 90 per cent of the respondents agreed that organizations should provide them the opportunity to share feedback. It also illustrates one-third of the total answers that organizations should ask their customers for review 'occasionally' (Microsoft 2019). Therefore, the urge to restoring company X's customer reviews is undeniable and should be implemented as soon as possible. Providing users the voice will not only help in enhancing the experiences, but it will also build loyalty by giving them a stake in the brand.

There are multiple methods in obtaining the online reviews: establishing email campaigns asking for feedbacks, encouraging users to provide reviews after every solved case or purchase, or sending out surveys to gather insights anonymously and later publish a report with collected data (Hubspot 2020). These methods are feasible for company X and need to be implemented gradually and whenever necessary.

In the same survey conducted by Microsoft (2019), it indicates user experience is a main competitive advantage to differentiate and personify a brand. Investing in online reviews would help increase brand awareness that later results in improving onboarding experience. During the adoption stage, users would search for recommendations and develop internal discussion on whether to adopt an innovation or not. With positive public online reviews, the conversion in adopting a product or service would increase.

5 Conclusion

This chapter concludes the research findings, recommendations and discusses the study outcomes and reflection on the author's learning and self-improvement. Besides, the validity and reliability of the report are indicated again to increase the relevancy and credibility of this research and the outcome. Additionally, the impact of this thesis research on the author's future career is also stated.

5.1 Key findings and recommendations

The research original objective is to develop the onboarding process for the commissioning company in order to convert more trial users into paying customers. Throughout the research, investigative questions (IQs) are established to divide the research into smaller phases for collecting data and analysing. With this research, the author has successfully figured out the answers to the IQs and been able to propose development suggestions for company X.

The current strengths and weaknesses of the customer onboarding process were identified through qualitative interviews. Figuring out the pros and cons of one's process can help the company learn and develop further. Although company X seems to have a great customer support team in servicing trial users, other onboarding approaches such as engagement emails, service packages and knowledge base need to be improved for better user experience. In the SaaS industry, to acquire new customers, software vendors not only should prove their benefits to fit with customer requirements but also show that they provide a better experience.

Regarding the competitors, all three of them have their own approaches in onboarding process and successfully adapted for better customer experience. The three onboarding elements, which are knowledge base, service offerings and engagement emails are all adopted and utilised to fit with their businesses and products. By learning from and comparing with the competitors, the author was able to consider the suitable practices for company X and propose suggestions to apply these practices.

The developments are categorized based on different onboarding aspects. Considering company X resources and ability, its self-service portal content needs to be improved and enriched with graphic content. Establishing service packages would assist users in adopting new applications faster. Meanwhile, maintain responsive support would increase touchpoints and drive positive user experience. Moreover, in order to acknowledge the current user experience for further development, the author recommends company X to gradually establish a feedback system. These suggestions are essential, feasible and cost-friendly for the commissioning to implement. Hence, the research question can be answered.

5.2 Validity and reliability

The material or sources of this research are chosen carefully and cited in line with texts and put in Reference. The opinions toward the current strength and weaknesses of the company are unbiased and objective as they were collected from the interviewees themselves. Most of the theories in chapters 2 and 3 were taken from books. Regarding the collected data of the competitors, the information is taken from reliable sources such as e-books, journals, surveys, and articles published by large enterprises, widely trusted websites and the competitors' websites themselves. A small part of theories relies heavily on Internet sources as books are not able to keep up with the development speed in the SaaS Customer Success field.

The research was conducted in an ethical way without disclosing any false information or respondent identities. The respondents were aware of this research and agreed to keep the identity anonymously. No wrongful action that violates the GDPR has been carried out during the research and writing process.

5.3 Suggestion for further research

SaaS industry is on the rise and becomes very competitive. Software vendors find it easier to retain current customers than to acquire new ones. As mentioned in the research, customers nowadays have more power in choosing the product or service and easily. By providing a customer-centric business approach with customer success development, software vendors able to engage and increase touchpoints with customers. Moreover, for customer onboarding is not only a pre-purchase phase, but it also happens after the purchase decision takes place, the author recommends a further research on the overall CS phase. She believes that CS would be the future of customer relationship management that should be applied to any industry and not only software. Nevertheless, regardless of the growth of CS, any company should consider their customers in the development and turn customer experience into a competitive advantage in the market.

Already known the SaaS market is competitive, the acquisition of new customers, especially large enterprises, mostly rely on third-party consultancy services. In Salesforce ecosystem, they are called 'Salesforce consultants'. For software vendors, they are called ‘partners’ who would help in recommending and implementing the software for their clients. Therefore, a research into establishing partner relationships and partner management for these SaaS vendors would be a great asset for them regardless of their sizes. Further research is needed to see what the possible outcome of developing relationships with these are ‘partners’ in respect of the company growth.

5.4 Reflect on own learning

By implementing in-depth research into customer success and SaaS industry, the author was able to determine her future career path. The development suggestions need to be appropriate because the author was required to consider other approaches through benchmarking and company’s resources. Conducting this study has enabled the author to acknowledge competitors’ application and their methods in customer management as well as establishing future tasks for her current position at the commissioning company.

In addition, during the thesis process, the author was challenged many times with a lack of information, motivation and heavy workload from her occupation. To experience a trial user journey fully, the author forced herself into learning to use new applications in a short period of time to develop knowledge in order for engaging with the competitors. As a result, the author learned a lot about the competitor and Salesforce related topics, as well as improved various soft skills such as self-discipline, patience, communications and organization skills.

In the future, the author wants to pursue her career in SaaS industry towards customer relationship management. She would like to assist the company in developing customer journey, CRM systems, establishing customer success to acquire new and retain current customers. By writing this research, the author believe that she would prove her knowledge of customer success and show her motivation in customer-related jobs.

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Appendices

Appendix 1. Interview questions.

Set 1: For the external respondents such as customers, users, company X partners

1. How did you hear of Documill Dynamo?
2. How much time do you usually spend on engaging with Dynamo a week?
3. How do you feel about the user interface?
4. What do you think of the overall Dynamo user experience?
5. How do you find our emails giving you tips on the use of Dynamo?
6. How have our Resource centre and Instruction video/ infographics helped you?
7. When our customers have questions that are not yet answered in the Resource Centre, they can email our customer service.
   - Did you use the service?
   - Did you receive the service when you needed it (quickly)?
   - Was it helpful?
8. Did the service meet your needs?
9. What do you think about the overall experience during your trials?
10. Do you think 30 days is too much or too little time to test the service? Why do you think that?

Set 2: For the internals such as company representatives.

1. How do you see the application display in Salesforce? What do you think about the application Quick Setup guide?
2. When you have a demo or try to create a template, have you tried exploring Resource Center (Knowledge Base)?
   - Do you find it easy to use?
   - Did you find what you need?
   - Do users have any feedback regarding the Resource Center? What are they?
3. We have developed email marketing automation, what is your opinion regarding the content? Do you find them work well in terms of attracting users?
4. During trial phase, do you actively reach out to customers to offer them support? What have they mentioned about the customer service?
5. What are the reasons that you have received the most when the users discontinue their usage?
6. What part of the onboarding process that you would like to improve?

Appendix 2. Benchmarking competitors

	About the company and the product	Number of Customers/ Users	Integration with CRM platforms	Setup Process	Application interface inside Salesforce	Knowledge base	Email Marketing	Service Offerings
Conga Composer	>500 employees Leader in the field with multiple products. Conga Composer is one of their suite solutions	nearly 1 million users	Salesforce	+Quick Setup without having to read knowledge base +Setup takes 10 minutes to implement before using	Quick setup with a few clicks under 10 minutes	+Textual and video contents place seperately on the website +Short videos with voice over and step-by-step guide +Conga University: provide interactive courses for users to learn and get certifications	+No email marketing during the trial period +Sales emails trying to reach to understand use cases and to offer personalized demo	+Chat support: 24/7, answer instantly, helpful although did mention that it is only for paying customer +Email support is only available for paying customers +Case email was forwarded to a sales agent +Different support packages depends on the service
PandaDoc	A new comer that has their own platform Nearly 300 employees according to their LinkedIn Has a separate platform and can integrate with different CRM clouds	over 17000 customers	Salesforce, Hubspot, Pipedrive, Zoho, Copper, etc.	+Go through Knowledge base to integrate with Salesforce +Setup takes 10 minutes to implement +Can instantly use PandaDoc platform after registration on their website	List of hyperlinked setup instructions that redirect to Knowledge base websites for textual and video contents	+Short videos inline with textual contents to visualize the process +Short videos with voice over +Easy to navigate inside the Knowledge base +Familiar terms, easy to understand and implement	+Email marketing ask to join free webinar and download ebook	+Offer personalized demo only if users pay +Support call can be booked through calendar and get connected with a support agent. Refuse to provide demonstration to trial user +Offer onboarding packages to help with integration and implementation by paying, adjustable depends on company size
Docomotion	Around 20 employees with one product	no approximate number was found	Salesforce	+Go through Knowledge base to setup +Download another software and install on personal computer +Setup takes 30 minutes to implement	+Replication of Knowledge base website inside Salesforce platform +Ability to search for information +Easy to navigate	+Text and image content +Hard to navigate and follow	+No email marketing personalized emails try to reach out for a call to help with use case +Engage users at a very ealy stage with sales email, offer personalized demo	+Only provide support to user with business emails +Add user to communities using Salesforce Chatter to keep up to date regarding company activities, upcoming marketing related activities like webinars

Appendix 3. Author’s invitation to participate in qualitative interviews

Dear [First name],

It appears to us that you have been trying out [Product name], how is it going?

My name is Hien, Customer Success Junior at Company X. I’m reaching out to offer something that might spark your interest, so please keep reading.

Currently, we’re doing a research at Company X, concentrates on the user experience, in depth of how our service has helped you during your trial. Having been spending time during 30-day trial and been using one of our customer services, you might have some experience that your insights would be very valuable to us.

To do this research, a 60-minute online interview will be held in your chosen time between Feb 20th and Mar 8th 2020. Your identity will not be disclosed in the final result. You can read more about our Privacy Policy and GDPR on our website.

As a thank-you gift for your help in making our service better, we're glad to offer you a free template design, which translates into 8 hours of professional service and is worth 1200 euros.

If this has excited you in some ways, please let us know and we will get back to you at the soonest.

Best regards,
Hien Tran